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ABSTRACT

Nineteen units on filing, office machines, and general office clerical occupations are presented in this teacher's guide. The unit topics include indexing, alphabetizing, and filing (e.g., business names); labeling and positioning file folders and guides; establishing a correspondence filing system; utilizing charge-out and follow-up file systems; filing materials (e.g., numerically); computing routine math transactions; operating office machines (e.g., offset machine); handling mail; purchasing supplies; and handling petty cash. Each instructional unit generally contains eight components: performance objectives; an outline of minimum instructor and student activities to accomplish unit objectives; information sheets presenting basic unit content; transparency masters; job sheets which outline skills to be achieved; student assignment sheets related to the unit information sheets (answer sheets are provided); and objective tests with answer sheets. (CT)

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ED170604

UNITS OF INSTRUCTION

FOR

VOCATIONAL

OFFICE

EDUCATION

U.S. DEPARTMENT OF HEALTH,
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VOLUME I

FILING, OFFICE MACHINES, AND
GENERAL OFFICE CLERICAL OCCUPATIONS

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

TEACHER'S GUIDE

CE 021 533

FIRST EDITION

1978

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FOREWORD

The Vocational Office Education (VOE) instructional units were developed as a result of a project funded by the Texas Education Agency to East Texas State University and the Occupational Curriculum Development Laboratory. These units were developed with the assistance of VOE instructors throughout the state of Texas and have been subjected to formal field testing and evaluation.

The enclosed materials provide instruction for skills to be acquired for entry level into various clerical occupations. They also provide uniformity in classroom instruction and program accountability.

Instructors' editions include objectives; suggested activities; references; information, assignment, and job sheets; tests; and answer sheets.

Student editions, which are duplicates of the instructors' materials with the exception of activity sheets, references, and answers, also are available.

USE OF THE INSTRUCTIONAL UNITS

The VOE instructional units cover certain instructional areas in the classroom program. Each unit includes the basic components of a unit of instruction, performance objectives, suggested activities, information sheets, assignment sheets, job sheets, transparency masters, unit test, and answers to unit tests. Units are planned to cover more than one classroom period.

Careful study of each instructional unit will enable the teacher to determine:

A. The amount of material that can be covered in each class period

B. Skills that must be demonstrated

C. Supplies and equipment needed for skill performance

D. The amount of classroom time needed for teacher demonstration and student practice

E. Supplementary materials to be ordered

F. Any resource personnel who must be contacted

The specific components of an instructional unit perform the following functions.

OBJECTIVES

Each unit of instruction is based on performance objectives. These objectives specify behaviors the student will be exhibiting, thus providing students with a sense of direction.

Performance objectives are stated in two forms: Terminal Objectives, which state materials to be covered in the units of instruction and how the student will handle the material; and Specific Objectives, which state the types of performance students will be doing to satisfy the unit objective.

After the students read the objectives, classroom discussion should follow so that questions concerning expected performances can be answered.

SUGGESTED ACTIVITIES

Each unit of instruction has a suggested activities sheet outlining steps to follow in accomplishing specific objectives.

Instructor: Duties will vary from unit to unit, but the following are minimum activities:

1. Provide students with objectives, information, assignment and/or job sheets
2. Discuss objectives and information sheets
3. Make transparencies
4. Demonstrate procedures outlined on job sheets (when included)
5. Give test

Any additional instructional activities and teaching methods to aid students in accomplishing the objectives are strongly encouraged.

Student: Activities are listed to help achieve the objectives of the unit.

INFORMATION SHEET

Information sheets provide current data essential for meeting the cognitive requirements of the unit. These sheets provide an excellent guide for presenting material necessary to develop the skills specified in the unit objective.

Students should read the information sheets before the material is discussed in class. They are encouraged to make any additional notes on the information sheets to help them in their learning process.

TRANSPARENCY MASTER

Transparency masters provide information in a special way by presenting new material or reinforcing material presented in the information sheets. These are particularly effective when identification is necessary.

Transparencies made from the masters can be used as student handouts to supplement material contained in information sheets.

Copies of transparency masters can be used as student handouts to supplement material contained in information sheets.

JOB SHEETS

Job sheets are an integral part of each unit of instruction and the instructor should be able to demonstrate the skills outlined. Procedures specified in job sheets give direction for each skill being taught and allow both student and teacher to check student progress. Job sheets provide a ready outline to students and furnish potential employers an outline of the types of skills being taught.

ASSIGNMENT SHEET

Assignment sheets give direction to study and furnish activities which provide application of the material contained in the information sheet. These may be given to students for completion in class or for homework assignments. Answer sheets are provided for checking student progress.

UNIT TEST

Unit test questions have been constructed to measure student achievement of each specific objective listed on the objectives sheet. Individual test items may be pulled out and used as short tests to determine student achievement of a particular objective. This kind of testing may be used as a daily quiz and will help the teacher spot difficulties being encountered by students in their efforts to accomplish the terminal objective.

ANSWERS TO UNIT TEST

Test answers are provided for each unit. These may be used by the teacher and/or student for checking student achievement of the objectives.

PERSONALIZING AND LOCALIZING INSTRUCTIONAL UNITS

Carefully review the instructional units before using them in the classroom. In reviewing the units, you may find it necessary to localize and personalize the units based upon the needs of your students.

Units may be supplemented through use of audio-visuals, attention-getters, field trips, resource personnel, games and simulations, case studies, peer teaching, role playing, and personal experiences of both the teacher and students.

Various methods may be used in localizing a unit of instruction. You may wish to apply units of instruction to the local community, add additional materials from newspapers and magazines, invite local resource persons, and arrange for field trips.

In personalizing a unit of instruction, you may want to make the course content relevant to home and/or work situations. You may wish to involve students in planning a unit by using their own personal experiences. Involving students in presenting some of the material is sometimes an effective example of peer teaching.

Remember that as an instructor, you may wish to add any objectives to the units of instruction based on the individual needs of the student. If this procedure is followed, you must add the corresponding information in the information sheet, add any assignment or job sheets as deemed necessary, and construct a corresponding unit test item.

USOE CODE NUMBERS AND OCCUPATIONAL TITLES

14.0300 FILING, OFFICE MACHINES, AND GENERAL OFFICE CLERICAL OCCUPATIONS

Planned learning experiences which include a combination of courses and practical experiences concerned with the recording and retrieval of data, including classifying, sorting and filing correspondence, records, and other data.

14.0301 DUPLICATING MACHINE OPERATORS

Programs concerned with reproducing handwritten or typewritten matter by use of duplicating machines and devices.

Chief Clerk, Print Shop (clerical)
Braille-Duplicating-Machine Operator (clerical)
Copy Operator (r.r. trans.)
Duplicating-Machine Operator (clerical) II
Duplicating-Machine Operator (clerical) III
Mimeograph Operator (clerical)
Offset-Duplicating-Machine Operator (clerical)
Typewriter Operator, Automatic (clerical)
Duplicating-Machine Operator (clerical) I
Duplicating-Machine Operator (clerical) IV
Photographic-Machine Operator (clerical)
Stencil-Cutter Operator (clerical)

14.0302 FILE CLERKS

Programs concerned with the recording and retrieval of data, including classifying, sorting, and filing correspondence, records, and other data.

Classification Clerk (clerical)
Cut Man (print. & pub.)
File Clerk (clerical) I
File Clerk (clerical) II
Fingerprint Clerk (gov. ser.) II
Librarian (print. & pub.)
Record Clerk (clerical) II
Record Custodian (banking)
Brand Recorder (gov. ser.)

14.0303 GENERAL OFFICE CLERKS

Programs concerned with performing a variety of clerical duties utilizing knowledge of systems and reports, including copying data, and compiling records and reports; tabulating and posting data in record books; providing information and conducting interviews; operating office machines; and handling mail and correspondence.

Account Analyst (banking)
Actuarial Clerk (insurance)
Advice Clerk (banking)
Aircraft-Log Clerk (air trans.)
Billing Clerk (clerical) II
Bond Clerk (banking)
Box-Estimator, Paperboard Products
  (paper goods)
Budget Clerk (clerical)
COD Clerk (clerical)
Chart Clerk (petrol. refin.)
Checker (amuse. & rec.)
City-Collection Clerk (banking)
Clearing-House Clerk (banking)
Clerk, Cable Transfer (tel. & tel.)
Clerk, General Office (clerical)
Clerk, Telegraph Service (tel. & tel.)
Coding Clerk (clerical)
Collateral-and-Safekeeping Clerk (banking)
Contract Clerk, Automobile (ret. tr.)
Control Clerk, Auditing (insurance)
Control Clerk, Data Processing (clerical)I
Country-Collection Clerk (banking)
Coupon-Collection Clerk (banking)
Crew Scheduler (air trans.)
Demurrage Clerk (r.r. trans.)
Dispatcher Clerk (r.r. trans.)
District Clerk (clerical)
Exchange Clerk (banking)
Film-Rental Clerk (ret. tr.)
Flight-Crew-Time Clerk (air trans.)
Foreign-Collection Clerk (banking)
Insurance Clerk (banking) I
Insurance Clerk (banking) II
Insurance Clerk (clerical) I
Interest Clerk (banking)
Letter-of-Credit Clerk (banking)
Load-Control Agent (air trans.)

Main-Extension Clerk (light, heat, & power)
Manifest Clerk (water trans.)
Margin Clerk (banking)
Margin Clerk (finan. inst.)
Media Clerk (bus. ser.)
Mortgage-Accounting Clerk (clerical)
Paper Control Clerk (water trans.)
Paymaster (clerical)
Planimeter Operator (gov. serv.)
Policy-Change Clerk (insurance)
Probate Clerk (banking)
Programmer, Detail (clerical)
Rate Clerk, Freight (motor trans.)
Rate Reviewer (light, heat, & power)
Rater (insurance)
Real-Estate Clerk (clerical)
Reserves Clerk (banking)
Returned-Item Clerk (banking)
Revising Clerk (motor trans.; r.r. trans.)
Revival Clerk (insurance)
Services Clerk (water trans.)
Settlement Clerk (ore dress., smelt., & refin.)
Sorting Clerk (banking)
Statistical Clerk (clerical)
Statistical Clerk, Advertising (ret. tr.)
Tax Clerk (clerical) I
Timekeeper (clerical)
Traffic-Rate Clerk (clerical)
Trust-Vault Clerk (banking)
Ward Clerk (medical ser.)
Worksheet Clerk (insurance)
Measurer (agric.)
Accounting Clerk (clerical)
Additions and Betterments Clerk (r.r. trans.)
Advertising-Space Measurer (clerical)
Booking Prizer (tobacco)
Brokerage Clerk (finan. inst.) I
Collection-Sheet Clerk (motor trans.)
Cost Clerk (clerical)
Deposit Refund Clerk (light, heat, & power)
Fabric-and-Accessories Estimator (garment)
Foreign Clerk (clerical)
Insurance Checker (insurance)
Reinsurance Clerk (insurance)
Toll-Rating Clerk (tel. & tel.)
Voucher Clerk (r.r. trans.)
Coin-Machine Operator (clerical)
Bookman (whole. tr.)

Charge-Refer Clerk (clerical)
Coin-Machine Operator (banking)
Data-Change Clerk (insurance)
Error-Ledger Clerk (clerical)
Kardex Clerk (clerical)
Meter-Order Clerk (light, heat, & power)
Posting Clerk (clerical)
Remittance Clerk (insurance)
Suspense Clerk (light, heat, & power)
Suspense-Retirement-Clearance-Ledger Clerk (light, heat, & power)
Telegraph-Service Rater (tel. & tel.)
Control Clerk, Data Processing (clerical)
Tallyman, Fish (gov. ser.)

14.0399 FILING, OFFICE MACHINES, AND GENERAL OFFICE CLERICAL OCCUPATIONS, OTHER

Programs concerned with filing, office machines, and general office clerical occupations, including emerging occupations which are emphasized in instruction but not classified above.

Transcribing Operator, Head (clerical)
Braille-Machine Operator (print. & pub.)
Cryptograph-Machine Operator (clerical)
Photocomposing-Machine Perforator Operator (print. & pub.)
Telautograph Operator (clerical)
Transcribing Machine Operator (clerical)
Typesetter-Perforator Operator (print. & pub.)
Embossing-Machine Operator (clerical) I
Embossing-Machine Operator (clerical) II
Ticket-Machine Operator (clerical)
Collator Operator (clerical)
Microfilm Mounter (any ind.)
Coordinator, Letter Campaign (drug, prep., & rel. prod.)
Stenographic-Pool Supervisor (clerical)
Technical Coordinator (gov. ser.)
Call-Out Operator (bus. ser.; ret. tr.)
Evaluator (clerical)
In-File Operator (bus. ser.)
Cancellation Clerk (insurance)
Classified-Ad Clerk (print. & pub.)
Continuity Clerk (motion pic.)
Mortgage Clerk (banking)
Mortgage-Processing Clerk (clerical)
Reader (bus. ser.)

Reference Clerk (ret. tr.)
Special-Certificate Dictator (insurance)
Statement Clerk (banking)
Title Searcher (real estate)
Circulation Clerk (print. & pub.)
Coupon Clerk (banking)
Invoice-Control Clerk (clerical)
Morticer (clerical)
Sampleman, Paper (paper & pulp; paper goods)
Addresser (clerical)
Clerk,General (clerical)
Contact Clerk (light, heat, & power)
Copy Holder (clerical)
Credit Card Clerk (ret. tr.)
Customer-Control Clerk (clerical)
History-Card Clerk (light, heat, & power)
Library Clerk, Talking Books (library)
Price Clerk (clerical)
Routing Clerk (banking)
Translator, Braille (print. & pub.)
Address-Plate Inserter (clerical)
Slip Puller (bus. ser.)
Braille Proofreader (print. & pub.)
Checker (clerical) II
Checking Clerk (banking)
Display-Desk Clerk (print. & pub.)
Order Caller (clerical)
Proofreader (print. & pub.) I
Reviewer (insurance)
Sorter (clerical)
Weight Caller (clerical)
Yardage Caller (textile)

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UNIT I

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

TERMINAL OBJECTIVE

After completing this unit, the student will be able to define indexing terminology; cite rules for indexing, coding, and arranging personal names in alphabetic order; and type index cards for filing. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student will be able to:

1. Match terms relating to indexing, alphabetizing, and filing.
2. Cite three procedures used in indexing.
3. Identify true statements about indexing rules.
4. Demonstrate the ability to:
    a. Index an individual name.
    b. Code personal names.
    c. Alphabetize personal names in filing order.
    d. Cross-reference married names and unusual names.

14.0302

UNIT I

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

SUGGESTED ACTIVITIES

I. Instructor:

A. Provide objective sheet.

B. Discuss objective sheet.

C. Provide information sheet.

D. Discuss information sheet.

E. Using the chalkboard, demonstrate the rules for indexing personal names.

F. Give instructions for typing index cards.

G. Show transparencies and discuss indexing names and cross-referencing procedures.

H. Provide assignment sheets.

I. Discuss assignment sheets.

J. Provide job sheets.

K. Discuss job sheets.

L. Give test and evaluate.

II. Student:

A. Read and discuss objective sheet.

B. Study information sheet.

C. Participate in class discussion of indexing personal names.

D. View transparencies and participate in discussion of indexing names and cross-referencing procedures.

E. Complete assignment sheets.

F. Complete job sheets.

G. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

- A. Objective sheet
- B. Information sheet
- C. Transparency masters
    1. I-TM-1--Indexing Personal Names
    2. I-TM-2--Cross-Referencing Married Women's Names
    3. I-TM-3--Cross-Referencing Unusual Names
- D. Assignment sheets
    1. Assignment Sheet #1--Questions on Indexing
    2. Assignment Sheet #2--Determining Indexing and Alphabetizing Order
    3. Assignment Sheet #3--Cross-Referencing
- E. Answers to assignment sheets
- F. Job sheets
    1. Job Sheet #1--Indexing and Alphabetizing Personal Names
    2. Job Sheet #2--Typing and Indexing Names
- G. Answers to job sheets
- H. Test
- I. Answers to unit test

II. References:

- A. Books:
    1. Bassett, Ernest D. and David G. Goodman. Business Filing and Records Control. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

2. Bassett, Ernest D. and David G. Goodman. Office Filing Procedures. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

3. Johnson, Mina M. and Norman F. Kallaus. Records Management. 2nd ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

4. Meehan, James R., et al. Clerical Office Procedures. 5th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

5. Meehan, James R., et al. Secretarial Office Procedures. 8th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

B. Practice Sets:

1. Duchan and Schultheis. Filing Personal Names, Learning Activity Package I. Cincinnati, Ohio: South-Western Publishing Co.

2. Kahn, Stewart, and Yerian. Gregg Quick Filing Practice. Dallas, Texas: Gregg Division, McGraw-Hill Book Co.

C. Visual Aids:

1. __________. File and Find, 50 Spirit Masters. Portland, Maine: J. Weston Walch.

14.0302

UNIT I

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

INFORMATION SHEET

I. Definition of Terms

   A. Personal name--The legal name of a person whether it is usually used as an individual name or as a part of a business name

   B. Surname--The last name of a person

   C. Given name--The first name or initial of a person and a middle name or an initial

   D. Full name--The surname and at least one given name or initial of a person

   E. Natural order--The order in which a full name normally appears

   F. Indexing--The process of dividing names into indexing units for the purpose of selecting the caption under which a record is to be filed

   G. Indexing arrangement--The order in which the units of a name are arranged for filing

   H. Unit--Each part of the name of a person or organization used in filing alphabetically

   I. Indexing unit--A part of a name that is used in indexing and arranging alphabetically

   J. Coding--The process of marking the indexing units in a name to indicate the order in which the units will be filed

   K. Filing order--The indexing order in which a name is written for filing purposes (first indexing unit, second indexing unit, etc.)

   L. Alphabetizing--The arrangement of single letters or words according to the alphabet A-Z

   M. Filing--The systematic, orderly arrangement and storage of letters, invoices, statements, catalogs, and other office or personal records that may be needed for personal reference

N. Cross-reference--A notation in the index showing the record is filed somewhere else

II. Indexing Procedures

A. Determine how many units a name contains.

EXAMPLE: John/ R./ Thompson
1 2 3

Frank/ James/ Tilleny
1 2 3

B. Determine which of the units in a name is the most important one to be used for filing purposes.

EXAMPLE: Thompson,/ John/ R.
1 2 3

Tilleny,/ Frank/ James
1 2 3

C. Code the names in correct filing order.

D. Alphabetize the names for filing.

EXAMPLE: Thompson, John R.

Tilleny, Frank James

III. Rules for alphabetic indexing of personal names

A. Each initial or part of the name of an individual is considered to be a separate indexing unit.

EXAMPLE: Richard/ L./ Slaughter
1 2 3

B. For filing purposes, an individual's name is transposed so that the surname becomes the first unit, the given name or initial becomes the second unit, and the middle name or initial becomes the third unit. (Each initial is treated as a separate indexing unit.)

NAME	INDEXING UNITS 1	2	3
Richard L. Slaughter	Slaughter	Richard	L.
Raymond Roy Slade	Slade	Raymond	Roy
Horace Joe Skidmore	Skidmore	Horace	Joe
R. Skaggs	Skaggs	R.	
R. M. Skaggs	Skaggs	R.	M.
Ray Skaggs	Skaggs	Ray	
D. Skinner	Skinner	D.	
Darrell Lee Skinner	Skinner	Darrell	Lee

C. If two or more surnames are alike, the order of filing is determined by the second unit. If the second unit is alike, the filing order is determined by the third unit.

D. "Nothing comes before something;" therefore, a surname with only an initial comes before a surname with a complete first name.

NAME	INDEXING UNITS 1	2	3
R. Skaggs	Skaggs	R.	
R. M. Skaggs	Skaggs	R.	M.
Ray Skaggs	Skaggs	Ray	

E. A foreign particle (sometimes called a prefix) or a foreign article is combined with the part of the name following it to form a single indexing unit.

NAME	INDEXING UNITS 1	2	3
C. A. Van Hauen	Van Hauen	C.	A.
John E. von Aspern	von Aspern	John	E.
James D. La Font	La Font	James	D.
Michael Le Blanc	Le Blanc	Michael	
Betty Vander Veer	Vander Veer	Betty	
Theresa A. O'Leary	O'Leary	Theresa	A.

F. A personal or professional title or degree is usually not considered in determining alphabetic order.* A name consisting of a title followed by only one name is indexed in the order in which it is written.

*NOTE: A title or degree not considered in indexing is written in parenthesis at the end of the name for identification purposes.

Betty Jackson, Ed.D.	Jackson, Betty (Ed.D.)
Dr. Frank L. Inlow	Inlow, Frank L. (Dr.)
Rev. L. D. Bayless	Bayless, L. D. (Rev.)
Sir Kingston	Sir Kingston
Lord Franklin	Lord Franklin

G. Seniority titles used to identify identical names are not considered to be indexing units, but serve as identifying elements in determining the correct order and are considered before consulting addresses.

NAME	INDEXING UNITS 1	2
Charles Duncan Jr.	Duncan	Charles (Jr.)
Charles Duncan Sr.	Duncan	Charles (Sr.)
Allen R. Russell I	Russell	Allen (I)

Allen R. Russell II	Russell	Allen (II)
Allen R. Russell III	Russell	Allen (III)

H. Addresses are used to determine the filing order (but are not considered as indexing units) when full names are identical. Use as much of the address as needed in the following order: city, state, street, house, or building in ascending order.

NOTE: Abbreviations such as Wm. for William, Jas. for James, and Robt. for Robert, should be indexed as spelled in full.

Thos. L. Smith, Chicago, Ill.

Thomas L. Smith, Covey, N. M.

I. Hyphenated surnames of individuals are treated as separate units, and hyphens are ignored when indexing such names.

NAME	INDEXING UNITS		
	1	2	3
Ruth Goz-Ware	Goz	Ware	Ruth
Victor Cros-Vogal	Cros	Vogal	Victor
Jean Holtz-Borg	Holtz	Borg	Jean

J. A married woman's legal name, when known, is used for filing purposes. The legal name is her husband's surname, then her given name, and lastly her middle or maiden name. "Mrs." is written in parentheses after a name. Names of married women may be cross-referenced.

NAME	INDEXING UNITS		
	1	2	3
Mrs. Harold Rollins (Jackie)	Rollins	Jackie (Mrs.)	
Mrs. Jane Ann Clark	Clark	Jane Ann (Mrs.)	

Mrs. Louise Allen Fontz	Fontz	Louise	Allen (Mrs.)
Mrs. Robert Smith (Kay Lee)	Smith	Kay Lee (Mrs.)	

Filed Under	Cross-Referenced Under
Rollins, Jackie (Mrs.)	Rollins, Harold (Mrs.)
Smith, Kay Lee (Mrs.)	Smith, Robert (Mrs.)

K. When it is difficult to determine which unit of a person's name is the surname, the last unit as it appears in written form should be considered the surname. Unusual names may be cross-referenced.

	Filed Under	Cross-Reference
Harrison Lyman	Lyman, Harrison	Harrison, Lyman
Session Phillip	Phillip, Session	Session, Phillip

IV. Steps in cross-referencing

A. Married women's names

1. In index form, write married woman's legal name on first line of original card. On fourth line, write Mrs. and her husband's name.

2. On the first line of the cross-reference card, write in index form, the husband's name followed by Mrs. in parentheses. On the fourth line, write See followed by the legal name in index form. (NOTE: See I-TM-2).

B. Unusual names

1. In index form, write unusual name on first line of original card (Ling, Tu). On fourth line, write Tu Ling.

2. On first line of cross-reference card, write Tu Ling, and on fourth line, write See Ling, Tu.

3. If numbering cards, use number of original card followed by an X.

C. File the original copy as follows:
    1. Married woman's name
        a. married surname
        b. legal first name
        c. legal second name
    2. Unusual names
        a. assumed surname
        b. assumed first name
        c. assumed middle name

D. File the duplicate as follows:
    1. Married woman's name
        a. married surname
        b. husband's first name
        c. husband's second name
    2. Unusual names
        a. surname
        b. first name
        c. middle name

INDEXING PERSONAL NAMES

Personal Name	Unit 1	Unit 2	Unit 3
Joan Adams	Adams	Joan	
Jon Adams	Adams	Jon	
Wm. Ames	Ames	William	
Daniel Dela Rosa	Dela Rosa	Daniel	
LeRoy McKinny	McKinny	LeRoy	
Donald Murdock	Murdock	Donald	
Paul Thos. O'Brien	O'Brien	Paul	Thomas
A. B. Stroney	Stroney	A.	B.
Abner B. Stroney	Stroney	Abner	B.
Harry Wills	Wills	Harry	
Charles Wilson	Wilson	Charles	
Alvin Young-Tree	Young	Tree	Alvin

CROSS-REFERENCING MARRIED WOMEN'S NAMES

Smith, Kay Lee (Mrs.) 1

Mrs. Robert Smith
526 Lanewood Drive
Oakland, CA 94601

ORIGINAL CARD

Smith, Robert (Mrs.) 1X

526 Lanewood Drive
Oakland, CA 94601

SEE

Smith, Kay Lee (Mrs.)

CROSS-REFERENCE CARD

CROSS-REFERENCING UNUSUAL NAMES

Son, Gen (Dr.) 51

Dr. Gen Son
594 Medical Towers
Burlingame, CA 94010

ORIGINAL CARD

Gen Son (Dr.) 51X

594 Medical Towers
Burlingame, CA 94010

SEE

Son, Gen (Dr.)

CROSS-REFERENCE CARD

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UNIT I

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

ASSIGNMENT SHEET #1--QUESTIONS ON INDEXING

Directions: In brief paragraph form, answer the following questions.

1. What is the difference between "natural order," "indexing," and "filing order"?

2. Why is it necessary to code a name?

3. How is the term "nothing comes before something" used in filing?

4. State the procedure and give an example of cross-referencing using the following:

   a. Married names

   b. Unusual names

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UNIT I

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

ASSIGNMENT SHEET #2--DETERMINING INDEXING AND ALPHABETIC ORDER

I. Arrange the following list of names in correct indexing order.

Albert G. Gonzales

Franklin Robert

Pierce Wood

Anna Shulty-Williams

Hubert van Miden

Joe Riley Jr.

Joe Riley Sr.

Clara Bernart Smith

O. Gonzales

P. R. Woods

J. Fulton Williams

Mrs. Robert Adams (Jane)

Nellie Ruth Aster

John Annen

Mary Lee Astor

Joseph Hare (I)

Joseph Hare (II)

Joseph Hare (III)

II. Arrange the above list in alphabetic order according to the first indexing unit. If surnames are alike, consider the second unit, then third unit, etc.

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UNIT I

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

ASSIGNMENT SHEET #3--CROSS-REFERENCING

A. The following list of names has been indexed and placed in alphabetic filing order.

Place a check mark (✓) in the column to the right indicating whether the name has been indexed and cross-referenced correctly.

RIGHT WRONG

1. Mrs. Raymond R. Miller (Peggy Ann)

   Miller, Peggy Ann
   SEE Miller, Raymond R. (Mrs.) ________

2. Mrs. Harold Cummings (Connie R.)

   Cummings, Connie R.
   SEE Cummings, Harold (Mrs.) ________

3. Mrs. Van T. Arnold (June Marie)

   Arnold, June Marie
   SEE Arnold, Van T. (Mrs.) ________

4. Mrs. James Ray Hearn (Vickie)

   Hearn, James Ray (Mrs.)
   SEE Hearn, Mrs. Vickie ________

5. Gen Son

   Gen, Son
   SEE Son, Gen ________

6. Jackson Andrew

   Jackson, Andrew
   SEE Andrew, Jackson ________

7. Rogers Mitchell

   Mitchell, Rogers
   SEE Rogers, Mitchell ________

RIGHT WRONG

8. Harrison Fairchild

Fairchild, Harrison
SEE Harrison, Fairchild ________________

9. Drayson Lynik

Lynik, Drayson
SEE Drayson, Lynik ________________

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UNIT I

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

1. Natural order refers to the order in which a full name normally appears. Indexing order refers to the process of dividing a name into indexing units for the purpose of selecting a caption for filing. Filing order refers to the indexing order in which a name is written for filing purposes.

2. Coding a name simply means marking or identifying the indexing units in a name by determining the most important unit through coding. The process of filing is expedited and is more accurate.

3. In filing, a surname with only an initial is filed before a surname with a full first name.

4. a. When cross-referencing a married name, prepare two indexing cards. The first card is called the original card on which the legal name is written in transposed order. The second card is called the cross-reference card on which the husband's name is written.

EXAMPLE: Mrs. Fred Allen Fonsworth (Sue Ann)

Original Card	Cross-Reference Card
Fonsworth, Sue Ann	Fonsworth, Fred Allen (Mrs. Sue Ann)

b. When cross-referencing unusual names the original card shows the way the name is indexed and alphabetized while the cross-reference card shows the other way the name may be written.

Assignment Sheet #2

I. Gonzales, Albert, G.

Robert, Franklin

Wood, Pierce

Shulty, Williams, Anna
van Miden, Hubert
Riley, Joe (Jr.)
Riley, Joe (Sr.)
Smith, Clara, Bernart
Gonzales, O.
Woods, P., R.
Williams, J., Fulton
Adams, Jane (Mrs.)
Aster, Nellie, Ruth
Annen, John
Astor, Mary, Lee
Hare, Joseph (I)
Hare, Joseph (II)
Hare, Joseph (III)

II. Adams
Annen
Aster
Astor
Gonzales, Albert
Gonzales, O.
Hare, Joseph (I)
Hare, Joseph (II)
Hare, Joseph (III)
Riley, Joe (Jr.)
Riley, Joe (Sr.)
Robert

Shulty

Smith

van Miden

Williams

Wood

Woods

Assignment Sheet #3

	RIGHT	WRONG
1.	✓	
2.	✓	
3.	✓	
4.		✓
5.		✓
6.		✓
7.	✓	
8.	✓	
9.	✓	

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UNIT I

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

JOB SHEET #1--INDEXING AND ALPHABETIZING PERSONAL NAMES

I. Tools and equipment needed:

A. Twenty 3" x 5" index cards (or paper cut to this size)

B. Pen or pencil

C. List of names to be indexed and alphabetized

II. Job Procedure:

A. Write each name in proper indexing order on a separate card. Start the name approximately 1/2 inch from the left margin and 1/2 inch from the top of the card. In the top right corner of each card, number the card.

B. Upon completion of indexing, put the cards in correct alphabetical order.

1. Charles N. Bledsoe
2. Oliver Alldridge
3. Lucille Cain
4. James V. Adams
5. Neal S. Barker
6. Nowlin Caine
7. Marie Ainsworth
8. Clinton Basham
9. Hoyt Carney
10. Kimberly Baird
11. Fred Adams
12. Billy Bryant
13. James L. Adams
14. Raymond M. Banks
15. A. M. Aimsworth
16. Leland K. Barrow
17. Lorene Boggs
18. Olivia Alldredge
19. C. B. Bryant
20. Thos. L. Bailey

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UNIT I

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

JOB SHEET #2--TYPING AND INDEXING NAMES

I. Tools and equipment needed:

A. Ten 3" x 5" index cards (or paper cut to this size)

B. Typewriter

C. List of names to be indexed and alphabetized

II. Job Procedures:

Type each of the following names in correct indexing order on 3" x 5" cards. Set left margin six spaces from the left edge of the card. On the third line from the top, type the name. On line 5, type the street address; on line 6, the city and state.

A. Betsy Book, 6713 Kenwick, Dallas, Texas.

B. Ralph Brown, 1313 Ruby St., Fort Worth, Texas.

C. Carl Baker, 1212 Finwich, Sherman, Texas.

D. Marie Maddox, 713 Alta Vista, Houston, Texas.

E. Susan Thompson, 616 Ridgeway, Dallas, Texas.

F. Sue B. Thompson, 603 Ridgeway, Dallas, Texas.

G. R. J. Brown, 4789 Wren, San Antonio, Texas.

H. Betsy Book, 1121 Kendel, Overton, Texas.

I. Henry O'Riley, 226 Rodeo, Odessa, Texas.

J. Sue Ann Nevins, 111 Freeway Dr., Mineral Wells, Texas.

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UNIT I

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

ANSWERS TO JOB SHEETS

#1

11. Adams/Fred
13. Adams/James/L.
4. Adams/James/V.
15. Aimsworth/A./M.
7. Ainsworth/Marie
18. Alldredge/Olivia
2. Alldridge/Oliver
20. Bailey/Thos./L.
10. Baird/Kimberly
14. Banks/Raymond/M.
5. Barker/Neal/S.
16. Barrow/Leland/K.
8. Basham/Clinton
1. Bledsoe/Charles/N.
17. Boggs/Lorene
12. Bryant/Billy
19. Bryant/C./B.
3. Cain/Lucille
6. Caine/Nowlin
9. Carney/Hoyt

I-36

#2

Baker, Carl

Book, Betsy, Dallas

Book, Betsy, Overton

Brown, R. J.

Brown, Ralph

Maddox, Marie

Nevins, Sue Ann

O'Riley, Henry

Thompson, Sue B.

Thompson, Susan

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UNIT I

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

UNIT TEST

1. Match terms relating to indexing, alphabetizing, and filing by selecting the number of the correct definition and placing it in the blank to the left of the term.

_____ a. Personal name
_____ b. Surname
_____ c. Given name
_____ d. Full name
_____ e. Natural order
_____ f. Indexing
_____ g. Indexing arrangement
_____ h. Unit
_____ i. Indexing unit
_____ j. Coding
_____ k. Filing order
_____ l. Alphabetizing
_____ m. Filing
_____ n. Cross-reference

1. The first name or initial of a person and a middle name or an initial
2. The order in which the units of a name are arranged for filing
3. The process of marking the indexing units in a name to indicate the order in which the units will be filed
4. The order in which a full name normally appears
5. A part of a name that is used in indexing and arranging alphabetically
6. The last name of a person
7. The process of dividing names into indexing units for the purpose of selecting the caption under which a record is to be filed

8. The systematic, orderly arrangement and storage of letters, invoices, statements, catalogs, and other office or personal records that may be needed for personal reference

9. The surname and at least one given name or initial of a person

10. Each part of the name of a person or organization used in filing alphabetically

11. The indexing order in which a name is written for filing purposes (first indexing unit, second indexing unit, etc.)

12. The legal name of a person whether it is usually used as an individual name or as a part of a business name

13. The arrangement of single letters or words according to the alphabet A-Z

14. A notation in the index showing the record is filed someplace else

2. Cite four procedures used in indexing.

a.

b.

c.

d.

3. Place a check mark (✓) to the left of the statements which are true.

_____ a. Each letter and each part of a name is considered to be a separate indexing unit.

_____ b. An individual's surname is transposed so that the surname becomes the first unit used in filing.

_____ c. If two surnames are alike, the next indexing unit to be considered is the name of the city.

_____ d. A surname with a full first name comes before a surname with an initial.

_____ e. A foreign particle is combined with the part of the name following it to form a single indexing unit.

_____ f. Hyphenated names are treated as one filing unit.

_____ g. A married woman's legal name is used for filing purposes.

_____ h. When it is difficult to determine which unit of a person's name is the surname, the last name as it appears in written form should be considered the surname.

4. Demonstrate the ability to:

a. Index an individual name.

b. Code personal names.

c. Alphabetize personal names in filing order.

d. Cross-reference married names and unusual names.

(NOTE: If these activities have not been accomplished prior to the test, ask the instructor when they should be completed.)

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UNIT I

INDEXING, ALPHABETIZING, AND FILING PERSONAL NAMES

ANSWERS TO UNIT TEST

1. _12_ a.

_6_ b.

_1_ c.

_9_ d.

_2_ e.

_7_ f.

_4_ g.

_10_ h.

_5_ i.

_3_ j.

_11_ k.

_13_ l.

_8_ m.

_14_ n.

2. a. Determine how many units a name contains.

b. Determine which of the units in a name is the most important one to be used in filing.

c. Code the names in correct filing order.

d. Alphabetize the names for filing.

3. _✓_ a.

_✓_ b.

____ c.

____ d.

___✓___ e.

_______ f.

___✓___ g.

___✓___ h.

4. Evaluated to the satisfaction of the instructor.

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UNIT II

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

TERMINAL OBJECTIVE

After completing this unit, the student will be able to discuss, explain, and state rules pertaining to business names; index, alphabetize, and file business names; and cross-reference where necessary. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student will be able to:

1. Discuss the order of indexing personal names contained in business names.
2. Explain how to index identical business names.
3. Discuss the rule for indexing business names with articles, prepositions, and conjunctions.
4. Explain how to index abbreviations.
5. List the three rules pertaining to single letters in business names.
6. State the three rules for indexing hyphenated business names.
7. Explain how to index words considered as one word.
8. Discuss the five parts of the rule pertaining to numbers and symbols in business names.
9. Explain how to index words with possessives.
10. Discuss the two ways to index compound geographic business names.
11. State the three rules involved in indexing foreign business names.
12. Explain how to cross-reference business names.

13. Demonstrate the ability to:
    a. Index, alphabetize and file business names, and correct misfilings.
    b. Cross-reference business names.
    c. File business cards.

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UNIT II

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

SUGGESTED ACTIVITIES

I. Instructor:

  A. Provide students with objective sheet.

  B. Discuss objective sheet.

  C. Provide information sheet.

  D. Discuss information sheet.

  E. Explain and demonstrate rules covering indexing, alphabetizing, and filing of all business names.

  F. Explain and demonstrate cross-referencing.

  G. Provide assignment sheet.

  H. Discuss assignment sheet.

  I. Provide job sheet.

  J. Discuss job sheet.

  K. Give test and evaluate results.

II. Student:

  A. Read objective sheet.

  B. Participate in discussion of objectives.

  C. Study information sheet.

  D. Participate in discussion of information sheet.

  E. Participate in explanation and demonstration of indexing, alphabetizing, and filing business names.

  F. Participate in explanation and demonstration of cross-referencing.

  G. Read assignment sheets.

  H. Complete assignment sheets.

- I. Read job sheet.
- J. Complete job sheet.
- K. Take test.

INSTRUCTIONAL MATERIALS

- I. Included in this unit:
    - A. Objective sheet
    - B. Information sheet
    - C. Assignment sheets
        - 1. Assignment Sheet #1--Utilizing Rules for Business Names
        - 2. Assignment Sheet #2--Cross-Referencing Business Names
    - D. Answers to assignment sheets
    - E. Job sheet
        - 1. Job Sheet #1a--Filing Business Names on Cards
          Job Sheet #1b--Filing Business Names on Cards
    - F. Answers to job sheet
    - G. Test
    - H. Answers to test
- II. References:
    - A. Books
        - 1. Bassett, Ernest D. and David G. Goodman. Business Filing and Records Control. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.
        - 2. Duchan, Simon A. and Robert A. Schultheis. Filing Business Names. Cincinnati, Ohio: South-Western Publishing Co., 1974.
        - 3. Gregg, John Robert and others. Applied Secretarial Practice. 7th ed. Dallas, Texas: Gregg Division, McGraw-Hill Book Co., 1974.

4. Meehan, James R. and others. Clerical Office Procedures. 5th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

5. Meehan, James R. and others. Secretarial Office Procedures. 8th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

B. Additional References:

1. Practice Sets

    a. Bassett, Ernest D. and David G. Goodman. Alphabetic Filing Procedures. Cincinnati, Ohio: South-Western Publishing Co., 1974.

    b. Bassett, Ernest D. and David G. Goodman. Office Filing Procedures. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

    c. Kahn, Stewart and Yerian. Gregg Quick Filing Practice. Dallas, Texas: Gregg Division, McGraw-Hill Book Co.

2. Workbooks

    a. Guthrie, Mearl R. Alphabetic Filing. 3rd ed. Cincinnati, Ohio: South-Western Publishing Co., 1964.

3. Spirit Masters

    a. __________. File and Find, 50 Spirit Masters. Portland, Maine: J. Weston Walch.

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UNIT II

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

INFORMATION SHEET

I. Indexing personal names contained in business names

A. Each word is considered a separate indexing unit.

B. Transpose the name in this order: surname, given name or initial, middle name or initial.

C. Titles followed by a single given name are separate indexing units and are indexed in the order they are written.

(NOTE: Mr., Mrs., and Ms. are indexed as they are written.)

EXAMPLES:	Alphabetic Filing Order			
	1	2	3	4
Jamie Jones Pet Supplies	Jones	Jamie	Pet	Supplies
A. F. Kitchen, Inc.	Kitchen	A.	F.	Inc.
Mr. Lanny Farm Supplies	Mr.	Lanny	Farm	Supplies

(NOTE: A letter or unit underlined indicates the alphabetic filing sequence.)

II. Indexing identical business names

A. When all units in the names of two or more businesses are the same, the addresses are considered as identifying elements in indexing.

B. First consider the city or town; state names are considered when two cities have the same name; street addresses are considered if the same name is located at different addresses within the same city; if the same name is located at more than one address on the same street, then it should be arranged from lowest to highest street number.

(NOTE: The name of the building is used only when the street name is not known.)

EXAMPLES:	Alphabetic Filing Order 1	 2	Identifying Elements
Church's Chicken 111 Dow Drive Athens, Texas 79904	Church ('s)	Chicken	111 Dow Drive Athens, Texas 79904
Church's Chicken 235 Fern Circle Biloxi, MS 39580	Church ('s)	Chicken	235 Fern Circle Biloxi, MS 39580
Church's Chicken 1021 Pasturetti St. Pascagoula, MS 39775	Church ('s)	Chicken	1021 Pasturetti St. Pascagoula, MS 39775
Church's Chicken 15000 Pasturetti St. Pascagoula, MS 39775	Church ('s)	Chicken	15000 Pasturetti St. Pascagoula, MS 39775

III. Indexing articles, prepositions, and conjunctions

A. Articles, prepositions, and conjunctions are not considered as indexing units and should be put in parentheses.

B. When a preposition is the first word of a business name, it is considered the first indexing unit.

EXAMPLES:	Alphabetic Filing Order 1	 2	 3	 4
House of Lee	House (of)	Lee		
Of All Time Shop	Of	All	Time	Shop
The Pot Shoppe	Pot	Shoppe (The)		

IV. Indexing abbreviations

A. Abbreviations are indexed as if they were written in full.

B. When the exact meaning is not known, the abbreviation should be indexed as it is written.

EXAMPLES:	Alphabetic Filing Order 1	 2	 3
A. R. Inc.	A.	R.	Incorporated
Brown Bros. Shoes	Brown	Brothers	Shoes
Gov't Supplies	Government	Supplies	

V. Indexing single letters

A. "Nothing before something," therefore each letter or initial is a separate indexing unit.

B. A single letter precedes a word that begins with that letter.

C. Hyphens and spacing between letters are disregarded.

EXAMPLES:	Alphabetic Filing Order				
	1	2	3	4	5
A B C Nursery School	A	B	C	Nursery	School
A B Printers	A	B	Printers		
A. C. Air Filters	A	C	Air	Filters	
L-M Manufacturers	L	M	Manufacturers		

VI. Indexing hyphenated business names

A. In hyphenated business names, hyphens are ignored, and each word is considered a separate indexing unit.

B. Each part of a "coined" word joined by a hyphen is considered a separate indexing unit.

EXAMPLES:	Alphabetic Filing Order		
	1	2	3
Open-Door School	Open-	Door	School
Party Pak-Age	Party	Pak-Age	
Quick-Stop	Quick-	Stop	

VII. Indexing words considered as one

A. Words written as one or two words which are often considered as one word are indexed as a single unit.

B. The use of a hyphen or spacing is disregarded in indexing.

EXAMPLES:	Alphabetic Filing Order			
	1	2	3	4
G M & O Railroad	G	M (&)	O	Railroad
Lakeside Shopping Center	Lakeside	Shopping	Center	
Northeast Times	Northeast	Times		

VIII. Indexing numbers and symbols

A. Numbers and symbols in a business name are spelled out for indexing.

(NOTE: Numbers and symbols are written in figures though spelled out for indexing.)

B. The complete number is considered as one word.

C. When a number is accompanied by a symbol, each are considered separate indexing units.

(NOTE: Four digit numbers are written in hundreds, five digit numbers are in thousands.)

EXAMPLES:	Alphabetic Filing Order			
	1	2	3	4
Court of Two Sisters Restaurant	Court (of)	Two	Sisters	Restaurant
4900 Club	Forty-Nine Hundred	Club		
19th Century Antiques	Nineteenth	Century	Antiques	
One Shell Square	One	Shell	Square	

IX. Indexing possessives

A. When words within a name have an apostrophe showing possession, all of the letters in that word up to the apostrophe are considered in indexing.

B. When an "s" follows the apostrophe, it is not considered in indexing.

EXAMPLES:	Alphabetic Filing Order		
	1	2	3
Goldman's Inc.	Goldman' (s)	Incorporated	
Hoagies' Sandwich Shop	Hoagies'	Sandwich	Shop
Ken's Pizza Palace	Ken' (s)	Pizza	Palace

X. Indexing compound geographic business names

A. In compound geographic names containing two words, such as New York, each word is a separate indexing unit.

B. Compound geographic names written as one word, such as Portland, are considered to be one indexing unit.

EXAMPLES:	Alphabetic Filing Order			
	1	2	3	4
Baton Rouge Oil Co.	Baton	Rouge	Oil	Company
Bayou LaFourche Drillers	Bayou	LaFourche	Drillers	
Bear Mountain Resort	Bear	Mountain	Resort	
Fort Pickens Museum	Fort	Pickens	Museum	
Rockwood Sand Co.	Rockwood	Sand	Company	

XI. Indexing foreign business names

A. Each word (not particles or prefixes) in foreign business names is a separate indexing unit.

B. A foreign particle or prefix (such as d, el, and la) is considered with the word following it.

(REASON: The translated form includes articles, prepositions, or conjunctions.)

C. Unusual foreign names are indexed as they are written.

EXAMPLES:	Alphabetic Filing Order		
	1	2	3
Las Vegas Vendors	Las Vegas	Vendors	
Le Mans Jewelers	Le Mans	Jewelers	
Leyte Gulf Fisheries	Leyte	Gulf	Fisheries
Livonia Travel Agency	Livonia	Travel	Agency
Puerto La Cruz Divers	Puerto	La Cruz	Divers
Rio de Oro Woodworkers	Rio	de Oro	Woodworkers

XII. Cross-referencing business names

A. Combined surnames in a business name

1. Original--The original is filed as it is written.

2. Cross-references--A cross-reference is prepared for each surname after the first surname.

EXAMPLES:

Original	Cross-reference
Knight, Black, & Lamb Accountants	Black, Lamb, & Knight Accountants SEE Knight, Black, & Lamb Accountants
	Lamb, Knight, & Black Accountants SEE Knight, Black, & Lamb Accountants

B. Businesses with more than one name

1. A company is organized under one name but conducts its business under another name

   a. Original--The original is filed under the name in which it carries on its business.

   b. Cross-reference--A cross-reference is prepared under its organization name.

EXAMPLES:

Original	Cross-reference
Hoagies'	Hoagies' Sandwich Shop SEE Hoagies'

2. A company using an abbreviated form of the name

   a. Original--The original is indexed under the abbreviated form.

   b. Cross-reference--The cross-reference is made under the full name.

EXAMPLES:

Original	Cross-reference
The Co-op	The Co-operative Register SEE The Co-op

C. Branches or affiliates of businesses

1. Original--The original is indexed under the name appearing on the letterhead.
2. Cross-reference--The cross-reference is made under the name of the parent company.

EXAMPLES:

Original	Cross-reference
The Southwestern Company	The Times-Mirror Corporation SEE The Southwestern Company

D. Unusual or difficult business name combinations

1. Original--The original is indexed as it is written.
2. Cross-reference--The cross-reference is made under other possible combinations.

EXAMPLES:

Original	Cross-reference
Lee James & Company	James, Lee & Company SEE Lee James & Company

E. Initials and abbreviations

1. Original--The original is indexed under the name of the business.
2. Cross-reference--The cross-reference is made under the initial or abbreviation.

EXAMPLES:

Original	Cross-reference
Louisiana Power and Light Company	LP & L SEE Louisiana Power and Light Company

F. Change in a company name

1. Original--The original is indexed under new name.
2. Cross-reference--The cross-reference is made under the former name.

EXAMPLES:

Old Original	New Original	Cross-reference
Esso Company, U.S.A.	Exxon Company, U.S.A.	Esso Company, U.S.A.

(NOTE: Filing cross-references is performed in the same manner as the original.)

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UNIT II

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

ASSIGNMENT SHEET #1--UTILIZING RULES FOR BUSINESS NAMES

A. 1. In each of the following business names underline the first indexing unit.

   a) Mr. Beau's Tuxedo Shop
   b) The Arlt Shop
   c) A to Z Service Center
   d) Down-town Bakery
   e) Mrs. Mary Jones Sewing Center

2. In each of the following business names underline the second indexing unit.

   a) 25th Street Grocery
   b) North Carolina Distributors
   c) La Petite Candies
   d) Jennings' Pet Supplies
   e) #1 Cycles

3. In each of the following business names underline the third indexing unit.

   a) Joe Black's of San Antonio
   b) The Mary Hart Bread Shop
   c) In Your Eye Amusement Center
   d) Court of Two Sisters' Restaurant
   e) 7-11 Serve-Your-Self Market

B. Arrange the business names in questions 1-3 in the correct alphabetic sequence.

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

11.

12.

13.

14.

15.

C. Each group of business names is incorrectly filed. Determine the error and number the names in the correct filing order.

a. _____ Martin, C. T. Sewing Center (Mrs.)

_____ Mr. Joe's Shoes

_____ Mr. A. J. Magee (and) Son

b. _____ Downtown Shopper

_____ Double-D Meat Mkt.

_____ D-X Service Station

c. _____ Tatter's

_____ The Candy Cane

_____ Tennis Club

d. ______ Play Day Park

______ P-L Association

______ P L T

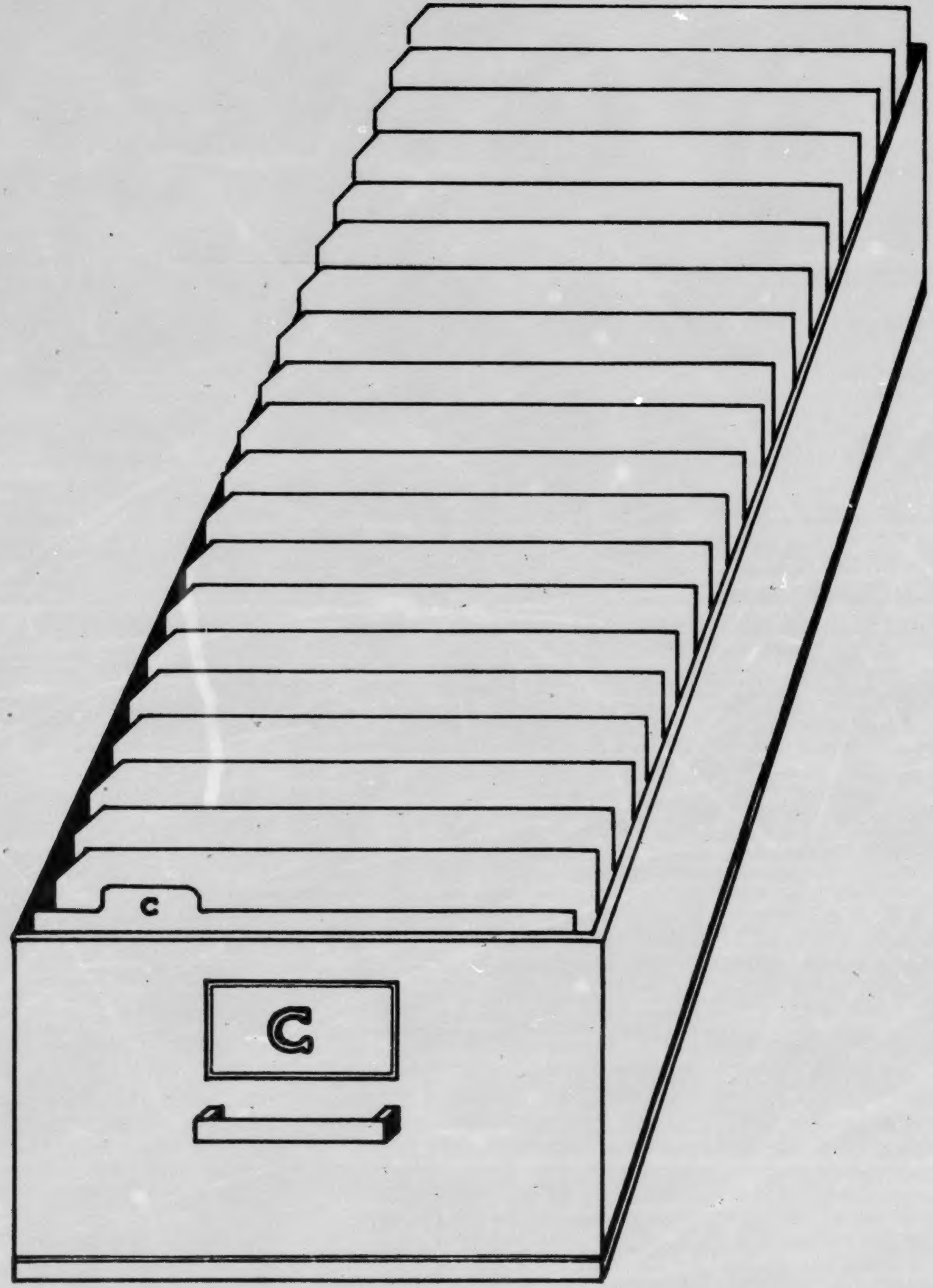
D. In the file pictured, place the names of the left column in their correct alphabetic order among the names of the right column. (Be sure to index first.)

Left (Incorrect filing order)

1. Camas Supply Co.
2. Coordinators of Dallas
3. C.D.C. Instruments
4. C-to-it Plumbers
5. Crapazano Hardware
6. C. C. Carter's Mobile Homes
7. Cathy's Closet
8. Coordinators of Fort Worth
9. The Craft Craze Shop
10. Carta Blanca Distributors

Right (Correct filing order)

A. Carter, C. D. Inc.
B. Campbell Paper Company
C. Carter-Benson Food Store
D. Carnahan, Bill (&) Co.
E. Central Lumber Company
F. Circle-R Drive-Inn
G. Coker'(s) Western Hatters
H. Continental Can Company
I. Cooper, Dallas (and) Son
J. C (&) S Sales Company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UNIT II

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

ASSIGNMENT SHEET #2--CROSS-REFERENCING

Directions: Cross-reference the following business names.

1. Hanes, Holland, & Haynes, Inc.

2. National Cash Register (NCR)

3. Wayne-Lee Grocery

4. Thomas Drugs--A Division of Eckerd Drugs

5. Texas Instruments

6. FBLA

7. Black and Decker

8. CIA

9. McGraw-Hill Book Company

10. Gregg - A Division of McGraw-Hill Book Company

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UNIT II

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

A. 1. a. Mr.
   b. Arlt
   c. A
   d. Downtown
   e. Jones
  2. a. Street
   b. Carolina
   c. Candies
   d. Pet
   e. One
  3. a. San
   b. Bread
   c. Eye
   d. Sisters'
   e. Serve-

B. 1. A (to) Z Service Center
  2. Arlt Shop (The)
  3. Black'(s) Joe (of) San Antonio
  4. Court (of) Two Sisters' Restaurant
  5. Downtown Bakery
  6. Hart, Mary Bread Shop (The)

7. In Your Eye Amusement Center
8. Jennings' Pet Supplies
9. Jones, Mary (Mrs.) Sewing Center
10. La Petite Candies
11. Mr. Beau'(s) Tuxedo Shop
12. North Carolina Distributors
13. Number One Cycles
14. Seven Eleven Serve Your Self Market
15. Twenty-fifth Street Grocery

C. a. 2

3

1

b. 3

2

1

c. 2

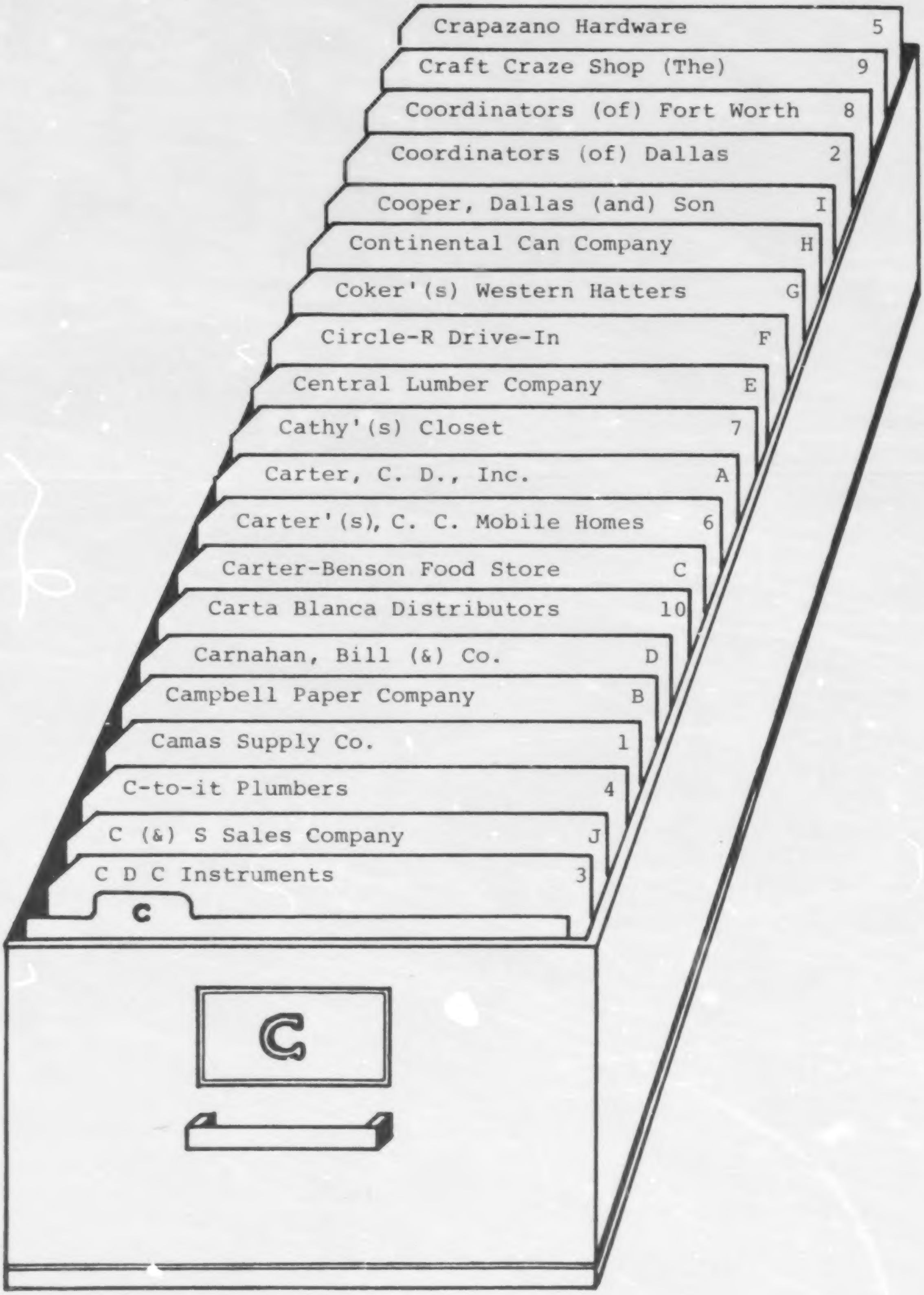
1

3

d. 3

1

2


Crapazano Hardware 5
Craft Craze Shop (The) 9
Coordinators (of) Fort Worth 8
Coordinators (of) Dallas 2
Cooper, Dallas (and) Son I
Continental Can Company H
Coker'(s) Western Hatters G
Circle-R Drive-In F
Central Lumber Company E
Cathy'(s) Closet 7
Carter, C. D., Inc. A
Carter'(s), C. C. Mobile Homes 6
Carter-Benson Food Store C
Carta Blanca Distributors 10
Carnahan, Bill (&) Co. D
Campbell Paper Company B
Camas Supply Co. 1
C-to-it Plumbers 4
C (&) S Sales Company J
C D C Instruments 3
C
C

Assignment Sheet #2

1. Hanes, Holland, & Haynes, Inc.

   Cross-references

   Holland, Haynes, & Hanes, Incorporated
   SEE Hanes, Holland, & Haynes, Incorporated

   Haynes, Hanes, & Holland, Incorporated
   SEE Hanes, Holland, & Haynes, Incorporated

2. National Cash Register

   Cross-reference

   NCR
   SEE National Cash Register

3. Wayne-Lee Grocery

   Cross-reference

   Lee Wayne Grocery
   SEE Wayne-Lee Grocery

4. Thomas Drugs--A Division of Eckerd Drugs

   Cross-reference

   Eckerd Drugs
   SEE Thomas Drugs

5. Texas Instruments

   Cross-reference

   TI
   SEE Texas Instruments

6. FBLA

   Cross-reference

   FBLA
   SEE Future Business Leaders of America

7. Black and Decker

   Cross-reference

   Decker and Black
   SEE Black and Decker

8. CIA

Cross-reference

CIA
SEE Central Intelligence Agency

9. McGraw-Hill Book Company

Cross-reference

Hill-McGraw Book Company
SEE McGraw-Hill Book Company

10. Gregg - A Division of McGraw-Hill Book Company

Cross-reference

Gregg
SEE McGraw-Hill Book Company

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UNIT II

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

JOB SHEET #1--FILING BUSINESS NAMES ON CARDS

I. Tools and equipment needed:

- A. Business cards
- B. Scissors
- C. Pen or pencil

II. Job Procedure:

Part A: In the following job (1) cut out each of the names and addresses listed on the business cards; (2) code each name by underlining the first indexing unit and numbering the remaining units; (3) arrange the cards in the proper alphabetic order and write their numbers in a list from first to last*; (4) check the alphabetic arrangement of this list with the teacher and correct any errors. Be sure to refer to rules when in doubt. (Do not cross reference.)

(NOTE: Each card is numbered A.)

*FILING JOB PART A

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____

Part B: Turn over the business cards and complete Filing Job B using the procedure outlined for Filing Job A.

(NOTE: Each card is numbered B.)

*FILING JOB PART B

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____
18. _____
19. _____
20. _____

A-1

U.S. Plywood Corp.
120 Louis Street
Anders, Nevada 10135

A-2

Holden's Plumbing Works
1022 Story Street
Cameo, Washington 55444

A-3

Trans-Atlantic Airways
5102 Airline Hwy.
Jonesboro, Tennessee 39470

A-4

700 Club
700 7th Avenue
New Orleans, LA 70130

A-5

Trans-Atlantic Oil Co. of
North Carolina
Bank of Orangeburg-Central
Orangeburg, NC 11111

A-6

CDC Industries, Inc.
Fairhope, New York 87099

A-7

International Trade Mart Co.
170 Park Avenue
New York, New York 88011

A-8

Holden-Albany Plywood, Inc.
Division of Champion Internatl.
2201 Wirt Street
Camden, Washington 54054

A-9

International Trade Mart Co.
100 Canal Blvd.
New Orleans, LA 70130

A-10

Pepsi-Cola Bottlers
2600 Dallas Street
Denver, Colorado 70003

B-1

Goodwill Fix-it Shop
123 Toledo
Gulfport, MS 39470

B-2

Ms. Liberty Hobbies
579 Frederic St.
Mobile, AL 34388

B-3

Shang Hi Lounge
2710 Garden Road
Gulfshores, AL 36608

B-4

U.D.C.
Sun Chapter
Sun, LA 70408

B-5

5-7-9 Shoppe
1010 Harrison Avenue
Atlanta, GA 11908

B-6

Five to Five Coffee Shop
505 Fifth Street
Franklin, MS 78910

B-7

Good Will Endeavors
987 Averett
Pascagoula, MS 55558

B-8

A. L. Rosenblum, Inc.
306 West Thomas
Hammond, LA 70401

B-9

A. L. Rosenblum, Inc.
173 North Columbia Rd.
Bogalusa, LA 70401

B-10

The Three Pigs Fitness Club
999 Wide Street
Fat City, LA 87109

A-11

Toni's Pizza Parlor
305 South Minosa Drive
Chicago, Illinois 73102

A-12

Isaac Printing Co.
1020 Downing Blvd.
Boston, Massachusetts 60614

A-13

Toni-Brown Plumbing
1022 Bendale
Chicago, Illinois 71302

A-14

International Trade Mart Co.
1511 Tamlerlane
Newport, New Jersey 37999

A-15

Tony & Toni Ltd.
901 Ross Dale Blvd.
Brownville, Calif. 10003

A-16

King of the Road Cycles
728 Montgomery St.
Chicago, Illinois 73102

A-17

Quick Linen Service
521 Richmond Ave.
San Diego, Calif. 74014

A-18

International Trade Mart Co.
1753 Bateman Drive
Tampa, Florida 22334

A-19

People's Life Insurance
1406 Ruston Circle
Boston, Massachusetts 60414

A-20

St. Gabriel Plywood Co.
9315 Stonewall
St. Gabriel, New Jersey 37999

B-11

Southeast Suppliers
2220 Cleary
Liberty, TX 72601

B-12

Madame Joliet of Quebec
1001 Ashton Avenue
Quebec, Canada

B-13

Rosenberg's
1825 Tulane Avenue
New Orleans, LA 71030

B-14

La Huerta
Toledo 25 Torrimar
Guaynabo, Puerto Rico 00742

B-15

U-Can-Do-It Hobbies
1717 Elizabeth
Amarillo, TX 00657

B-16

Sidney Rostenblums, Inc.
10010 Wesley Street
Denham Springs, LA 71777

B-17

West 8th Street Coiffeurs
18 West 8th Street
Galveston, TX 84920

B-18

North West Placement Office
1029 N. Leverett
Beaumont, TX 72701

B-19

A. L. Rosenblum, Inc.
21 Main Street
Covington, LA 70888

B-20

U.S. Paper Corporation
1717 West Capital
Jackson, MS 77112

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UNIT II

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

ANSWERS TO JOB SHEET

Job Sheet #1a

1	2	3	4	5 and/or Identifying Elements
A-8x Albany	Holden-	Plywood	Incorporated	Division(of)Champion International 2201 Wirt Street Camden, Washington 54054
A-13x Brown	Toni-	Plumbing		1022 Bendale Chicago, Illinois 71302
A-6 C	D	C	Industries, Inc.	Fairhope, New York 87079
A-8 Holden-	Albany	Plywood	Incorporated	Division(of)Champion International 2201 Wirt Street Camden, Washington 54054
A-2 Holden'(s)	Plumbing	Words		1022 Story Street Camden, Washington 55444
A-9 International	Trade	Mart	Company	100 Canal Boulevard New Orleans, LA 70130
A-7 International	Trade	Mart	Company	170 Park Avenue New York, NY 88011
A-14 International	Trade	Mart	Company	1511 Tamerlane Newport, NJ 37999
A-18 International	Trade	Mart	Company	1733 Bateman Drive Tampa, FL 22334
A-12 Isaac	Printing	Company		1020 Downing Boulevard Boston, Massachusetts 60614

1	2	3	4	5 and/or Identifying Elements
A-16 King (of) (the)	Road	Cycles		728 Montogomery St. Chicago, Illinois 73102
A-19 People'(s)	Life	Insurance		1406 Ruston Circle Boston, Massachusetts 60414
A-10 Pepsi-	Cola	Bottlers		2600 Dallas Street Denver, Colorado 70003
A-17 Quick	Linen	Service		521 Richmond Avenue San Diego, California 74014
A-20 Saint	Gabriel	Plywood	Company	9315 Stonewall St. Gabriel, New Jersey 37999
A-4 Seven Hundred	Club			700 7th Avenue New Orleans, LA 70130
A-13 Toni-	Brown	Plumbing		1022 Bendale Chicago, Illinois 71302
A-11 Toni'(s)	Pizza	Parlor		3055 Mimosa Chicago, Illinois 71302
A-15x Toni	Tony (&)	Limited		901 Ross Dale Boulevard Brownville, Georgia 10003
A-15 Tony (&)	Toni	Limited		901 Ross Dale Boulevard Brownville, Georgia 10003
A-3 Trans-Atlantic	Airways			5102 Airline Highway Jonesboro, Tennessee 39470
A-5 Trans-Atlantic	Oil	Company (of)	North Carolina	Bank (of) Orangeburg Central Orangeburg, North Carolina 11111

1	2	3	4	5 and/or Identifying Elements
A-1 United	States	Plywood	Corporation	120 Louis Lane Anders, Nevada 10135

Job Sheet #1b

1	2	3	4	5 and/or Identifying Elements
B-6 Five (to)	Five	Coffee	Shop	505 Fifth St. Franklin, MS 78910
B-5 Five	Seven	Nine	Shop	1010 Hamson Avenue Atlanta, GA 11908
B-7 Goodwill	Endeavors			987 Averett Pascagoula, MS 55558
B-1 Goodwill	Fix-	it	Shop	123 Toledo Gulfport, MS 39470
B-14 LaHuerta				Toledo 25 Torrimar Guaynabo, Puerto Rico 00742
B-12 Madame	Joliet (of)	Quebec		1001 Ashton Avenue Quebec, Canada
B-2 Ms.	Liberty	Hobbies		579 Frederic St. Mobile, AL 34388
B-18 Northwest	Placement	Office		1029 N. Leverett Beaumont, TX 72701
B-13 Rosenberg's				1825 Tulane Ave. New Orleans, LA 70130
B-9 Rosenblum	A.	L.	Incorporated	173 N. Columbia Rd. Bogalusa, LA 70423
B-19 Rosenblum	A.	L.	Incorporated	21 Main Street Covington, LA 70888
B-8 Rosenblum	A.	L.	Incorporated	306 West Thomas Hammond, LA 70401
B-16 Rostenblums	Sidney	Incorporated		10010 Wesley St. Denham Spgs., La 71777

1	2	3	4	5 and/or Identifying Elements
B-3 Shang	Hi	Lounge		2710 Garden Rd. Gulfshores, AL 36608
B-11 Southeast	Suppliers			2220 Cleary Liberty, TX 72601
B-10 Three	Pigs	Fitness	Club (The)	999 Wide St. Fat City, LA 87109
B-15 U	Can	Do	It	Hobbies 1717 Elizabeth Amarillo, TX 00651
B-4x U	D	C		Sun Chapter Sun, LA 70408
B-4 United	Daughters (of) (the)	Confederacy		Sun Chapter Sun, LA 70408
B-20 United	States	Paper	Corporation	1717 W. Capital Jackson, MS 77112
B-17 West	Eighth	Street	Coiffeurs	18 West 8th St. Galveston, TX 84920

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UNIT II

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

UNIT TEST

1. Discuss the order of indexing personal names contained in business names.

2. Explain how to index identical business names.

3. Discuss the rule for indexing business names with articles, prepositions, and conjunctions.

4. Explain how to index abbreviations.

5. List the three rules pertaining to single letters in business names.

   a)

   b)

   c)

6. State the three rules for indexing hyphenated business names.

   a)

   b)

   c)

7. Explain how to index words considered as one word.

8. Discuss the five parts of the rule pertaining to numbers and symbols in business names.

   a)

   b)

   c)

d)

e)

9. Explain how to index words with possessives.

10. Discuss the two ways to index compound geographic business names.

    a)

    b)

11. State the three rules involved in indexing foreign business names.

    a)

    b)

    c)

12. Explain how to cross-reference business names in the following instances.

    a) Combined names in a business name

b) Business with more than one name

c) Branches or affiliates of a business

d) Unusual or difficult business name combinations

e) Initials or abbreviations

f) Change in a company name

13. Demonstrate the ability to:

a. Index, alphabetize, and file business names and correct misfilings.

b. Cross-reference business names.

c. File business cards.

(NOTE: If the skills have not been accomplished prior to the test, ask the instructor when they should be completed.)

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UNIT II

INDEXING, ALPHABETIZING, AND FILING BUSINESS NAMES

ANSWERS TO UNIT TEST

1. Each word is considered a separate indexing unit and should be transposed in the following order: surname, given name or initial, middle name or initial. Titles followed by a single given name are separate indexing units and are indexed in the order they are written.

   (NOTE: Mr., Mrs., and Ms. are indexed as they are written.)

2. When all of the units in the names of two or more businesses are the same, the addresses are considered as identifying elements in indexing. First consider the city or town; state names are considered when two cities have the same name; street addresses are considered if the same name is located at different addresses within the same city; if the same name is located at more than one address on the same street then it should be arranged from lowest to highest street number.

3 Articles, prepositions, and conjunctions are not considered as indexing units and should be put in parentheses. When a preposition is the first word of a business name, it is considered the first indexing unit.

4. Abbreviations are indexed as if they were written in full unless the exact meaning is not known. When in doubt, index it as it is written.

5. a) Each letter or initial is a separate indexing unit.

   b) A single letter precedes a word that begins with that letter.

   c) Hyphens and spacing between letters is disregarded.

6. a) In hyphenated business names, hyphens are ignored and each word is considered one indexing unit.

   b) Two parts of a word joined by a hyphen are considered to be one indexing unit.

   c) Each part of a "coined" word joined by a hyphen is considered to be a separate indexing unit.

7. Words written as one or two words which are often considered as one word are indexed as a single unit. (The use of a hyphen or spacing is disregarded.)

8. a) Numbers and symbols in a business name are spelled out for indexing.

   b) Numbers and symbols are written in figures, though they are spelled out for indexing.

   c) The complete number is considered as one word.

   d) When a number is accompanied by a symbol, each are considered separate indexing units.

   e) Four digit numbers are written in hundreds and five digit numbers are written in the thousands.

9. When words within a name have an apostrophe showing possession,all of the letters in that word up to the apostrophe are considered in indexing. When an "s" follows the apostrophe, it is not considered in indexing.

10. a) In compound geographic business names containing two words, such as New York, each word is a separate indexing unit.

    b) In compound geographic business names written as one word, such as Portland, it is considered one indexing unit.

11. a) Each word (not particles or prefixes) in foreign business names is a separate indexing unit.

    b) A foreign particle or prefix (such as d, el, and la) is considered with the word following it. Reason: The translated form includes articles, prepositions, or conjunctions.

    c) Unusual foreign names are indexed as they are written.

12. a) In combined names in a business name, the original is filed as it is written and the cross-reference is prepared for each surname after the first.

    b) In businesses with more than one name, there are two possible situations: If a company is organized under one name, but conducts its business under another name, the original is filed under the name in which it carries on its business and the cross-reference is prepared under its organization name. When a company uses an abbreviated form of the name, the original is indexed under the abbreviated form and the cross-reference is made under the full name.

c) In branches or affilates of a business, the original is indexed under the name appearing on the letterhead and the cross-reference is made under the name of the parent company.

d) In unusual or difficult business name combinations, the original is indexed as it is written and the cross-reference is made under the other possible combinations.

e) When initials or abbreviations are used, the original is indexed under the name of the business and the cross-reference is made under the initial or abbreviation.

f) When a change in a company name occurs, the original is indexed under the new name and the cross-reference is made under the former name.

13. Evaluated to the satisfaction of the instructor.

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UNIT III

INDEXING, ALPHABETIZING, AND FILING ORGANIZATION NAMES

TERMINAL OBJECTIVE

After completing this unit, the student will be able to identify, select, and list rules pertaining to organization names; index, alphabetize, and file organization names; and cross-reference where necessary. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student will be able to:

1. Identify how to index schools: elementary and secondary and colleges, universities and special schools.
2. Select the rules for indexing churches and clubs.
3. List the procedures for indexing banks, trust companies, and loan associations.
4. Differentiate between the order of indexing newspapers and magazines.
5. Explain the rule for indexing hotel and motel names.
6. State the two ways of indexing radio and television stations.
7. Match index rules to the correct levels of government.
8. Identify steps in indexing foreign government names.
9. List four examples of filing in an alphabetic filing system.
10. List and explain how to cross-reference organization names in each of the five instances.
11. Demonstrate the ability to:
    a. Index, alphabetize, and file organization names and correct misfilings.

b. Cross-reference organization names.

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UNIT III

INDEXING, ALPHABETIZINC, AND FILING ORGANIZATION NAMES

SUGGESTED ACTIVITIES

I. Instructor:

- A. Provide students with objective sheet.
- B. Discuss objective sheet.
- C. Provide information sheet.
- D. Discuss information sheet.
- E. Explain and demonstrate rules covering indexing, alphabetizing, and filing of all organization names.
- F. Explain and demonstrate cross-referencing.
- G. Provide assignment sheets.
- H. Discuss assignment sheets.
- I. Assign additional jobs in applicable exercise papers.
- J. Give test and evaluate results.

II. Student:

- A. Read objective sheet.
- B. Participate in discussion of objectives.
- C. Study information sheet.
- D. Participate in discussion of information sheet.
- E. Participate in explanation and demonstration of indexing, alphabetizing, and filing organization names.
- F. Participate in explanation and demonstration of cross-referencing.
- G. Read assignment sheets.
- H. Complete assignment sheets.

I. Do additional jobs in applicable exercise papers.

J. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

  C. Assignment sheets

    1. Assignment Sheet #1--Utilizing Rules for Organization Names

    2. Assignment Sheet #2--Utilizing Rules for Cross-referencing

  D. Answers to assignment sheets

  E. Additional jobs in applicable exercise papers

  F. Test

  G. Answers to test

II. References:

  A. Books

    1. Bassett, Ernest D. and David G. Goodman. Business Filing and Records Control. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

    2. Gregg, John Robert and others. Applied Secretarial Procedures. 7th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

    3. Meehan, James R. and others. Clerical Office Practice. 7th ed. Dallas, Texas: Gregg Division, McGraw-Hill Book Co., 1974.

    4. Meehan, James R. and others. Secretarial Office Procedures. 8th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

B. Additional References

1. Practice Sets

a. Bassett, Ernest D. and David G. Goodman. Alphabetic Filing Procedures. Cincinnati, Ohio: South-Western Publishing Co., 1974.

b. Bassett, Ernest D. and David G. Goodman. Office Filing Procedures. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

2. Workbooks

a. Guthrie, Mearl R. Alphabetic Filing. 3rd ed. Cincinnati, Ohio: South-Western Publishing Co., 1964.

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UNIT III

INDEXING, ALPHABETIZING, AND FILING ORGANIZATION NAMES

INFORMATION SHEET

I. Indexing school names

  A. Elementary and secondary schools

    1. The first indexing unit is the city in which the school is located and then the name of the school. (A personal name within a school name is transposed in the usual manner.)

    2. If a school name begins with a city name, it is considered only once.

    3. State names are considered second if the city name in two or more states is identical.

  B. Colleges, universities, and special schools

    1. The first indexing unit is the most distinctive word. ("College" or "University" are never the first indexing unit.)

    2. Identically named schools are indexed by addresses. (A personal name within a school name is transposed in the usual manner.)

    3. A city name within a school name is considered to be an indexing unit.

EXAMPLES:	Alphabetic Filing Order				Identifying Elements
	1	2	3	4	
University of Arkansas	Arkansas	University	(of)		
Bogalusa High School	Bogalusa	High	School		
Pleasant Hill Elementary (Bogalusa)	Bogalusa	Pleasant	Hill	Elementary	
Louisiana State University (Baton Rouge)	Louisiana	State	University		(Baton Rouge)

EXAMPLES (con't.):	Alphabetic Filing Order				Identifying Elements
	1	2	3	4	
Louisiana State University (Shreveport)	Louisiana	State	University		(Shreveport)

II. Indexing church and club names

A. Churches

1. The first indexing unit is the most distinctive word within a name. (The denomination, if known, is indexed first.)

2. The word "church" is never considered the first indexing unit.

3. If a city name is the first word in a nondenominational church, it is the first indexing unit.

B. Clubs

1. Clubs are indexed according to the most clearly identifying word.

2. A city name is indexed wherever it appears. (When club names are the same in two or more cities, the city names are considered last as identifying elements.)

EXAMPLES:	Alphabetic Filing Order			
	1	2	3	4
First Baptist Church	Baptist	Church	First	
Baptist Student Union	Baptist	Student	Union	
Church of Christ	Christ	Church (of)		
New Orleans Golfers Asso.	New	Orleans	Golfers	Association
New Orleans Synagogue	New	Orleans	Synagogue	

III. Indexing banks, trust companies, and building and loan associations

A. Locations are used as the most descriptive units in names of financial organizations.

(NOTE: If the city name appears within the firm name, it is used only once.)

B. When city names are identical, state names are considered.

EXAMPLES:	Alphabetic Filing Order			
	1	2	3	4
Angie Savings and Loan	Angie	Savings (and)	Loan	
First State Bank (Harriman, TN)	Harriman	First	State	Bank
First State Bank (Rockwood, TN)	Rockwood	First	State	Bank
Metairie National Bank	Metairie	National	Bank	

IV. Indexing newspapers and magazines

A. The city is always the first indexing unit or units, with the name of the newspaper as it is written indexed next.

(NOTE: The city name is used only once.)

B. Magazines are indexed as they are written.

EXAMPLES:	Alphabetic Filing Order			
	1	2	3	4
Dallas Daily Herald	Dallas	Daily	Herald	
The Lion's Roar	Lion('s)	Roar (The)		
The Daily Star (Robert, OH)	Robert	Daily	Star (The)	

V. Hotels and motels

A. The first indexing unit is the most distinctive word in the name.

B. Hotel or motel services which include the name of the hotel or motel are indexed in the same manner.

(NOTE: "Hotel" or "motel" is never the first indexing unit.)

EXAMPLES:	Alphabetic Filing Order 1	2	3	4	Identifying Elements
The Hyatt House (Atlanta GA)	Hyatt	House (The)			(Atlanta)
The Hyatt House (Knoxville, TN)	Hyatt	House (The)			(Knoxville)
Hotel Monteleone	Monteleone	Hotel			
Hotel Monteleone Lounge	Monteleone	Hotel	Lounge		

VI. Radio and television

A. If call letters are used, each letter is a separate unit (WBRZ).

B. "Radio Station" or "Television Station" may be used as the first two indexing units.

(NOTE: Since call letters may be unknown, partly known, or incorrectly remembered, this way is preferred.)

EXAMPLES:	Alphabetic Filing Order 1	2	3	4	5	6
KAAY	Radio	Station	K	A	A	Y
KDXY	Radio	Station	K	D	X	Y
WNOE	Radio	Station	W	N	O	E
ABC-TV	Television	Station	A	B	C	
CBS-TV	Television	Station	C	B	S	
NBC-TV	Television	Station	N	B	C	

VII. Indexing government agencies and offices

A. United States government names

1. "United States Government" should be the first three indexing units for every federal government office.

2. They should be written on the correspondence if they do not already appear.

3. The following units should be the principal words in the name of the office: department, bureau, division and the like.

(NOTE: A list of government agencies and offices can be obtained from the United States Superintendent.)

EXAMPLES:	Alphabetic Filing Order										
	1	2	3	4	5	6	7	8	9	10	11
Civil Aeronautics Board	United	States	Government	Civil	Aeronautics	Board					
Amite Food Stamp Office	United	States	Government	Health	Education (and)	Welfare	Department (of)	Amite	Food	Stamp	Office
Social Security Administration	United	States	Government	Health	Education (and)	Welfare	Department (of)	Social	Security	Administration	
U.S. Employment Service	United	States	Government	Labor	Department (of)	Employment	Service				
U.S. Postal Service	United	States	Government	Post	Office	Department (of)	Postal	Service			
IRS	United	States	Government	Treasury	Department	Internal	Revenue	Service			

B. State, city and county government names

1. The state, city or county name is always the first indexing unit, and it should be written on the correspondence if it is not already stated.

2. The second indexing unit is the word "State", "City", or "County".

3. Succeeding units are the principal words in the bureau, department, board, or office.

   (NOTE: Bureau, department, board and the like are transposed.)

4. If city or county names are identical, state names are considered as identifying elements.

   EXAMPLES:

   1. Washington Parish Fair Board
      Franklinton, LA

   2. Bogalusa City School Board
      Bogalusa, NC

   3. City Health Office
      Jane, MD

   4. Florida Department of Health
      Tampa, FL

   5. State Department of Highways
      Boulder, CO

   6. Marion County Corner's Office
      Tucson, AZ

   7. Jones County Sheriff's Department
      Midway, AK

   Alphabetic Filing Order

   2. Bogalusa, City (of)
      School Board
      Bogalusa, NC

   5. Colorado, State (of)
      Highway Department (of)
      Boulder, CO

   4. Florida, State (of)
      Health Department (of)
      Tampa, FL

   3. Jane, City (of)
      Health Office
      Jane, MD

   7. Jones, County (of)
      Sheriff('s) Department
      Midway, AK

   6. Marion, County (of)
      Coroner('s) Office
      Tucson, AZ

   1. Washington, Parish (of)
      Fair Board
      Franklinton, LA

VIII. Foreign governments

A. The first indexing unit is the English name of the foreign country.

B. Divisions by whatever title are considered in the same manner as are the departments of the United States government.

   (NOTE: A good source for determining translations is the Stateman's Yearbook.)

EXAMPLES:

1. Ministry of State
   Kingdom of Morocco
2. Council of Defense
   France
3. Norway Parliament
4. Department of Naval Affairs
   Canada
5. National Committee
   Great Britain
6. French Air Force
7. Minister of Justice
   Denmark
8. German Federal Council

Alphabetic Filing Order

4. Canada, Dominion (of)
   Naval Affairs, Department (of)
7. Denmark, Kingdom (of)
   Justice, Minister (of)
6. France, Republic (of)
   Air Force
2. France, Republic (of)
   Defense, Council (of)
8. Germany, Republic (of)
   Federal Council
5. Great Britain, Kingdom (of)
   National Committee
1. Morocco, Kingdom (of)
   Ministry, State (of)
3. Norway, Kingdom (of)
   Parliament

IX. Subjects

A. Sometimes correspondence within an alphabetic arrangement may be filed by the subject.

(NOTE: Be careful not to use so many that the file becomes a subject file with alphabetic names as subdivisions.)

B. Examples of subject filing under alphabetic filing:

1. Applications
2. Bids on projects
3. Promotions or celebrations
4. Branch office memos and duplicated information

EXAMPLES:	Alphabetic Filing Order				
	1	2	3	4	5
Applications					
1. Joe Perry Accountant	Applications	Accountant	Perry	Joe	
2. Jane Mann Clerk	Applications	Clerk	Mann	Jane	

EXAMPLES (con't):	Alphabetic Filing Order				
	1	2	3	4	5
Applications					
3. Terry Olah Clerk	Applications	Clerk	Olah	Terry	
4. Mark Smith Factory Maintenance	Applications	Maintenance	Factory	Smith	Mark
5. Luke Thomas Office Maintenance	Applications	Maintenance	Office	Thomas	Luke
6. Alice Rester Secretary	Applications	Secretary	Rester	Alice	

X. Cross-referencing organization names

A. Newspapers

1. Original--The original is filed under the city of publication.

2. Cross-reference

a. A cross-reference is made under the newspaper name when the city of publication is not part of the newspaper name.

b. A cross-reference is also made under the name of the publisher in case the name of newspaper may be forgotten.

EXAMPLES:

Original	Cross-reference
Baton Rouge: Morning Advocate (The)	Morning Advocate (The) SEE Baton Rouge: Morning Advocate (The)
	Sun City Publishing Company SEE Baton Rouge: Morning Advocate (The)
Chicago Frost Daily Tribune	(Here no cross-reference is necessary because (1) the city name is the first unit in the newspaper name and (2) the name of the publisher and the newspaper are the same.)

B. Magazines

1. Original--The original is filed under the name of the magazine.

2. Cross-reference--The cross-reference is filed under the name of the publisher in case the name of the magazine is forgotten.

EXAMPLE:

Original	Cross-reference
The Balance Sheet	South-Western Publishing Company SEE The Balance Sheet

C. Guardians, trustees, receivers

1. Original--The original is filed under the name of the individual or organization for whom the agent is acting.

2. Cross-reference--The cross-reference is made under the name of the guardian, receiver, or trustee.

EXAMPLE:

Original	Cross-reference
Pierce, Sue Lynn (Miss)	First National Bank, Trustee SEE Pierce, Sue Lynn (Miss)

D. Foreign language spellings of foreign governmental agencies

1. Original--The original is filed under the English translation.

2. Cross-reference--The cross-reference will be the original spelling.

EXAMPLE:

Original	Cross-reference
China	Chung-Hua Jen-Min Kung-Ho Kuo

E. "See Also" References

1. Original--The original will be the name and address of the business.

2. Cross-reference--The cross-reference will be the name and address of the company under which this business is a subdivision.

   EXAMPLE:

Original	Cross-reference
Rio Northside Elementary School	James County School Board Rio, Montana
	SEE ALSO
	James Elementary Rio Southwest Elementary School Samaritan High School
	(and all others affiliated with James County School Board)

3. Cross-reference--The cross-reference will be made for each name with alternative spellings.

   EXAMPLE:

   Magee--SEE ALSO McGee, McGhee, MaGhee

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UNIT III

INDEXING, ALPHABETIZING, AND FILING ORGANIZATION NAMES

ASSIGNMENT SHEET #1--UTILIZING RULES FOR ORGANIZATION NAMES

A. In the following names index each unit correctly and underline identifying elements.

1. U.S. Bureau of Enforcement

2. Broadmoor High School

   Louisville, Kentucky

3. Sunny Hill Baptist Church

   Harriman, North Carolina

4. The Houston Times

   Houston, Texas

5. State Department of Education

   Boise, Iowa

6. City and County Bank

   Oak Ridge, Tennessee

7. The Fountain Blue Motel

   Mandeville, Georgia

8. Better Business Bureau

   Huntington Beach, California

9. Vendor - Dixie Bearing Inc.

10. Vendor - Aetna Bearings

11. Kingdom of Denmark

    Ministry of Trade

12. Better Business Bureau

    Ides, California

13. University of Arizona

    Tucson, Arizona

14. Vendor - DAR Ball and Roller Bearings

15. Vendor - Fafnir Ball Bearings

B. List in the correct alphabetic filing order the names used in A. Be sure to write them in the order of their indexing units.

C. Each group of business names is incorrectly filed. Determine the error and number the names in the correct filing order.

1. _____ a. Anchorage, Rebel (The)
   Anchorage, Alaska

   _____ b. Radio Station KAAY
   Akron, Arkansas

   _____ c. Rainbow, Riding Club (The)
   Rainbow, Arizona

2. _____ a. Daily News (The)
   Denver, Colorado

   _____ b. Dallas Daily News
   Dallas, Texas

   _____ c. Dayton Daily News
   Dayton, Ohio

3. _____ a. Internal Revenue Service (Treasury Department)

   _____ b. Social Security Administration (Department of Health, Education, and Welfare)

   _____ c. Welfare Office (Department of H.E.W.)

4. _____ a. Bogalusa High School

   _____ b. College, Louisiana State

   _____ c. University (of) Alabama

D. In the file pictured, place the names of the left column in their correct alphabetic order among the names of the right column. (Be sure to index first.)

Left (Incorrect filing order)

a. Security National Bank
Compton, Texas 39400

b. WVZ TV
Las Vegas, CA 31003

c. American Home
Ohio Publishers
Deute, Ohio 44510

d. Tara High School
Ames, Iowa 77711

e. Television Repair Club
1017 Columbus Drive
Robert, TX 39773

f. Air Force Recruiters
24th Division
Ft. Beauregard, Oregon 71370

g. Timetellers Club
10 Clock Street
James, Ill. 54150

h. United Brethren Church
P.O. Box 98
Deute, Ohio 44510

i. Gracious Living
Ohio Publishers
Deute, Ohio 44510

j. University of Georgia
Athens, GA 12543

Right (Correct filing order)

1. Ames, Woodlawn High School
Ames, Iowa 77711

2. Saint Mary('s) Catholic Church
Ames, Indiana 71171

3. Security National Bank
Commerce, TX 75428

4. Glamour Magazine
South Publishers, New York, NY 77850

5. Glorieta High School
Glorieta, NM 39540

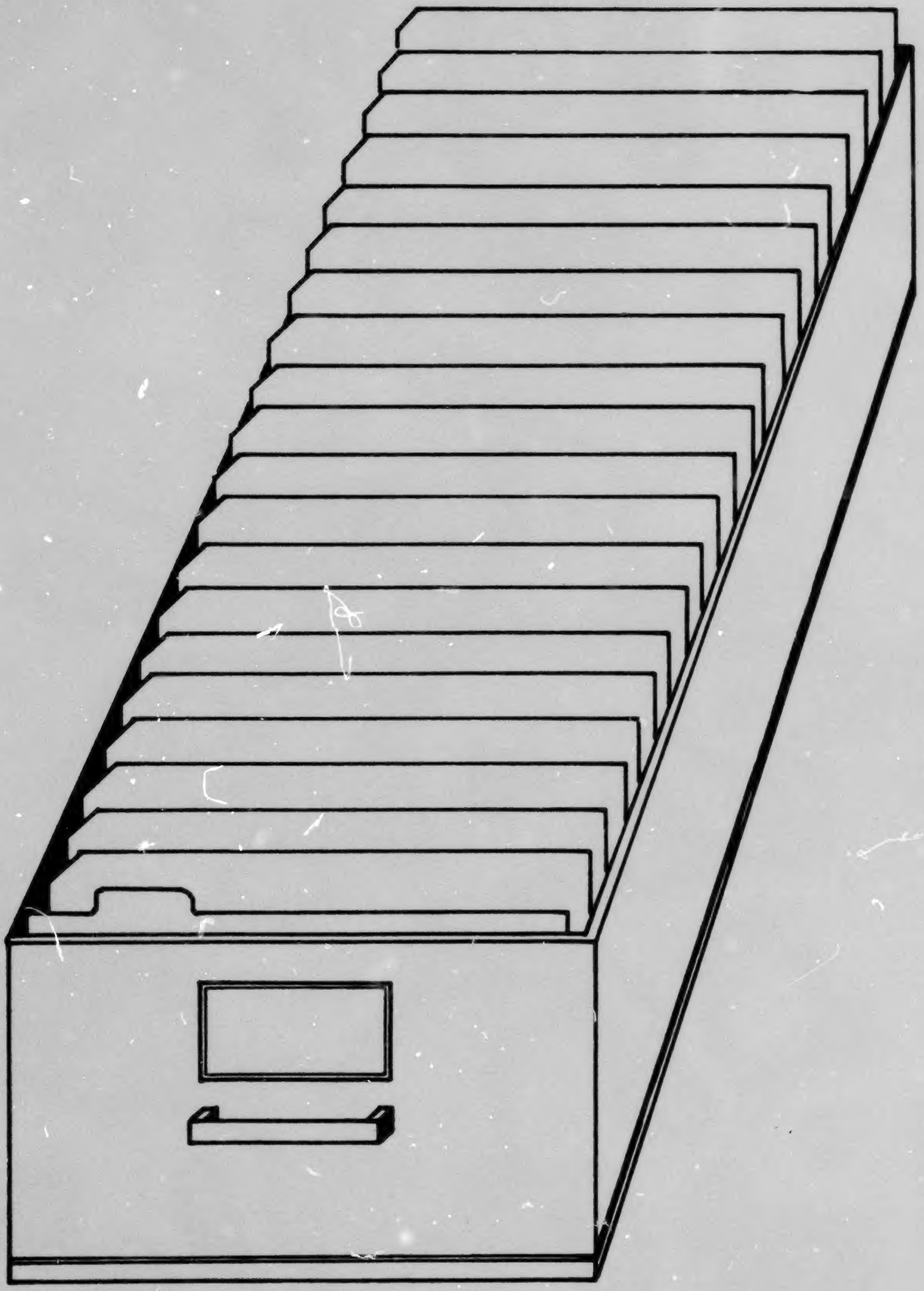
6. Sailing Club
213 Jones Blvd.
Galveston, TX 17518

7. Saint Louis News
C. T. James, Publisher
St. Louis, Ill. 74505

8. Television Station WYES
Los Angeles, CA 91077

9. U. S. Government
Commerce, Dept. (of)
Patent Office
Washington, D.C. 20111

10. U. S. Government
Defense, Dept. (of)
Army Recruiter('s) Office
Ft. Polk, VA 31712



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UNIT III

INDEXING, ALPHABETIZING, AND FILING ORGANIZATION NAMES

ASSIGNMENT SHEET #2--UTILIZING RULES FOR CROSS-REFERENCING

Directions: Cross-reference the following organization names.

1. Braun Brothers Inc.

2. The Times-Picayune News
   New Orleans, La.

3. Stacy Allison Ryals
   Mr. Terry Rene, guardian

4. Mexicana Imports

5. The Daily Star
   Sweetwater, TX

6. Journal of Business Education
   South-Western Publishing Company

7. Donna May Schech
   Washington Bank, Trustee

8. Chung-Hua Jen-Min Kung-Ho Kuo
   China

9. Crown Zellerbach Corporation
   Division of Crown Enterprises
   101 East Avenue
   Timeville, FL

10. Men's Journal
    Journal Publishers

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UNIT III

INDEXING, ALPHABETIZING, AND FILING ORGANIZATION NAMES

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

```
         1  2      3             5              4
A.  1.   U. S. Government Bureau (of) Enforcement

            2         3      4
    2.   Broadmoor High School
             1
         Louisville, Kentucky

           1        2       3    4
    3.   Baptist Church Sunny Hill

         Harriman, North Carolina

           1       2
    4.   Houston Times (The)

         Houston, Texas

           2       4               3
    5.   State Department (of) Education
          5      1
         Boise, Iowa

          1   2    3          4     5
    6.   Oak Ridge City (and) County Bank

         Oak Ridge, Tennessee

                  1        2     3
    7.   (The) Fountain Blue Motel

         Mandeville, Georgia

           1        2       3
    8.   Better Business Bureau

         Huntington Beach, California

           1        2        3           4
    9.   Vendor - Dixie Bearings Incorporated

           1        2        3
   10.   Vendor - Aetna Bearings
```

2 1
11. Kingdom (of) Denmark
4 3
Ministry (of) Trade

1 2 3
12. Better Business Bureau

Ides, California

2 1
13. University (of) Arizona

Tucson, Arizona

1 234 5 6 7
14. Vendor - DAR Ball (and) Roller Bearings

1 2 3 4
15. Vendor - Fafnir Ball Bearings

B.						Identifying Elements
	1	2				
13.	Arizona,	University (of)				Tucson, AZ
8.	Better	Business	Bureau			Huntington Beach, CA
12.	Better	Business	Bureau			Ides, CA
6.	City (and)	County	Bank			Oak Ridge, TN
11.	Denmark	Kingdom (of)	Trade	Ministry		
7.	Fountain	Blue	Motel (The)			Mandeville, GA
4.	Houston	Times (The)				Houston, TX
5.	Iowa	State	Education	Department (of)		Boise, Iowa
2.	Louisville	Broadmoor	High	School		Louisville, Kentucky
3.	Sunny	Hill	Baptist	Church		Harriman, NC
1.	United	States	Government	Enforcement	Bureau (of)	
10.	Vendor -	Aetna	Bearings			
14.	Vendor -	D	A	R	Ball(and)	

B. (con't)				Identifying Elements
9. Vendor -	Dixie	Bearing	Incorporated	
15. Vendor -	Fafnir	Ball	Bearings	

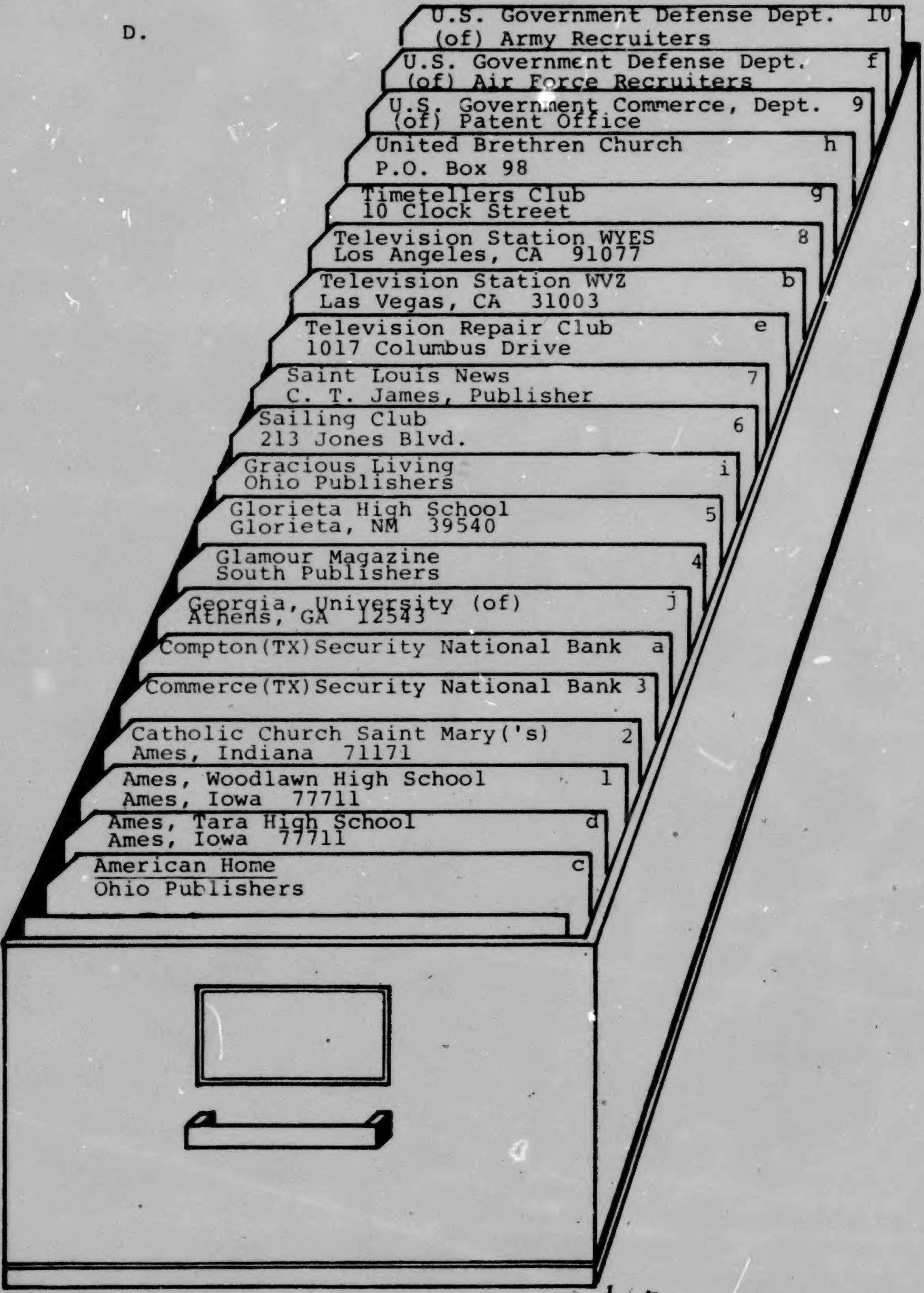
C. 1. 1
2
3

2. 3
1
2

3. 3
1
2

4. 2
3
1

D.



U.S. Government Defense Dept. 10
(of) Army Recruiters

U.S. Government Defense Dept. f
(of) Air Force Recruiters

U.S. Government Commerce, Dept. 9
(of) Patent Office

United Brethren Church h
P.O. Box 98

Timetellers Club g
10 Clock Street

Television Station WYES 8
Los Angeles, CA 91077

Television Station WVZ b
Las Vegas, CA 31003

Television Repair Club e
1017 Columbus Drive

Saint Louis News 7
C. T. James, Publisher

Sailing Club 6
213 Jones Blvd.

Gracious Living i
Ohio Publishers

Glorieta High School 5
Glorieta, NM 39540

Glamour Magazine 4
South Publishers

Georgia, University (of) j
Athens, GA 12543

Compton(TX)Security National Bank a

Commerce(TX)Security National Bank 3

Catholic Church Saint Mary('s) 2
Ames, Indiana 71171

Ames, Woodlawn High School 1
Ames, Iowa 77711

Ames, Tara High School d
Ames, Iowa 77711

American Home c
Ohio Publishers

Assignment Sheet #2

1. Braun Brothers, Inc.

Original

Braun Brothers, Inc.

Cross-reference

Brown Brothers, Inc.
SEE ALSO Braun Brothers, Inc.

2. The Times-Picayune News
New Orleans, LA

Original

New Orleans: Times-Picayune News (The)

Cross-reference

Times-Picayune News (The)
SEE New Orleans: Times-Picayune News (The)

3. Stacy Allison Ryals
Mr. Terry Rene, guardian

Original

Ryals, Stacy Allison

Cross-reference

Rene, Terry (Mr.) guardian
SEE Ryals, Stacy Allison

4. Mexicana Imports

Original

Mexicana Imports

Cross-reference

Mexican Imports
SEE Mexicana Imports

5. The Daily Star
Sweetwater, TX

Original

Sweetwater: Daily Star (The)

Cross-reference

Daily Star (The)
SEE Sweetwater: Daily Star (The)

6. Journal of Business Education
South-Western Publishing Company

Original

Journal (of) Business Education

Cross-reference

South-Western Publishing Company
SEE Journal of Business Education

7. Donna May Schech
Washington Bank, Trustee

Original

Schech, Donna May

Cross-reference

Washington Bank, Trustee
SEE Schech, Donna May

8. Chung-Hua Jen-Min Kung-Ho Kuo
China

Original

China

Cross-reference

Chung-Hua Jen-Min Kung-Ho Kuo
SEE China

9. Crown Zellerbach Corporation
Division of Crown Enterprises
101 East Avenue
Timeville, FL

Original

Crown Zellerbach Corporation
101 East Avenue
Timeville, Florida

Cross-reference

Crown Enterprises
SEE ALSO Crown Zellerbach Corporation

10. Men's Journal
Journal Publishers

Original

Men('s) Journal

Cross-reference

Journal Publishers
SEE Men('s) Journal

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UNIT III

INDEXING, ALPHABETIZING, AND FILING ORGANIZATION NAMES

UNIT TEST

1. Directions: Circle the correct answer - T if it is true and F if it is false.

T F a. In indexing elementary and secondary schools, the state name is considered second if the city name in two or more states is identical.

T F b. In indexing names of colleges and universities, the first indexing unit is always: College or University - whichever applies.

T F c. A personal name within a school name is transposed in its usual manner.

T F d. Identically named schools are indexed by addresses.

T F e. In indexing elementary and secondary schools, the first indexing unit is the city in which the school is located.

T F f. In indexing college and university names, a city name is considered to be the first indexing unit.

T F g. In indexing elementary and secondary school names, if a city name is within the school name, it is not considered the first indexing unit unless it is the first distinctive word.

2. Directions: Multiple Choice - Circle the number of the correct answer.

a. The first indexing unit in church names is:

1) the city name

2) "Church"

3) the most distinctive word

4) the first word in the title

b. In a nondenominational church the first indexing unit is

    1) the first word in the title of the church

    2) "Church"

    3) the most distinctive word

    4) the city name

c. Clubs are indexed

    1) in the same manner as elementary and secondary schools

    2) according to the most clearly identifying word

    3) according to the city name

    4) with the first indexing unit being the word "club"

d. When club names are the same in two or more cities

    1) the city names are considered last as identifying elements

    2) the state names are considered first as identifying elements

    3) the addresses are considered after the name as identifying elements

    4) the city names are considered first in indexing

3. List the three parts of the rule on banks, trust companies, and building and loan associations.

    a.

    b.

    c.

4. Explain the difference in indexing newspapers and magazines.

5. State the rule for indexing hotels and motels.

6. List the two ways radio and television stations may be indexed.

7. Directions: Matching - Check the rules which apply to the correct level(s) of government.

	1	2	3	4	5
a. United States	____	____	____	____	____
b. State	____	____	____	____	____
c. County	____	____	____	____	____
d. City	____	____	____	____	____

3) Should always be the first indexing unit(s) when dealing with this level of government.

5) Should be considered as (an) identifying element(s) when two or more city names are the same.

1) Should be the second indexing unit when dealing with this level of government.

4) The first indexing unit should be the name of this level of government.

2) Succeeding units of this level of government are the principal words in the bureau, department, board, or office.

8. Directions: Fill in the blanks correctly.

   a. In indexing foreign government names, a good source for determining translations is ______________________ ____________________.

   b. The first indexing unit in indexing foreign government names is the ______________________.

   c. The succeeding indexing units in a foreign government name are the ______________________.

   d. Foreign government names are always indexed in ________ _______________.

9. List the four examples of subject filing under alphabetic filing.

   a.

   b.

   c.

   d.

10. List and explain how to cross-reference organization names in each of the five instances.

    a.

    b.

c.

d.

e.

11. Demonstrate the ability to:

    a. Index, alphabetize and file organization names and correct misfilings.

    b. Cross-reference organization names.

    (NOTE: If these activities have not been accomplished prior to the test, ask the instructor when they should be completed.)

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UNIT III

INDEXING, ALPHABETIZING, AND FILING ORGANIZATION NAMES

ANSWERS TO UNIT TEST

1. a. T

   b. F

   c. T

   d. T

   e. T

   f. F

   g. F

2. a. 3

   b. 4

   c. 2

   d. 1

3. a. When dealing with local firms, the names are indexed as they are written.

   b. When dealing with local and out of town firms, the city name is considered as an identifying element followed by the firm name in the order it is written.

   c. When city names are identical, state names are considered.

4. In indexing newspapers, the city is always the first indexing unit with the name of the newspaper indexed next as it is written. Magazines are always indexed just as they are written.

5. In indexing hotels and motels, the first indexing unit is the most distinctive word in the name. "Hotel" or "motel" is never the first indexing unit. Hotel or motel services which include the name of the hotel or motel are indexed in the same manner.

6. Radio and television stations may be indexed in two ways. 1) If call letters are used, each letter is a separate indexing unit. 2) "Radio Station" or "Television Station" may be used as the first two indexing units.

	1	2	3	4	5
7. a. United States		X	X		
b. State	X	X		X	X
c. County	X	X		X	
d. City	X	X		X	

8. a. Statesman's Yearbook
   b. Country
   c. Divisions
   d. English

9. a. Applications
   b. Bids or projects
   c. Promotions or celebrations
   d. Branch office memos and duplicated information

10. a. Newspapers are filed under the city of publication and a cross-reference is made and filed: 1) under the newspaper name when the city of publication is not part of the newspaper name and 2) under the name of the publisher in case the name of the newspaper may be forgotten.

    b. Magazines are filed under the name of the magazine and a cross-reference is made and filed under the name of the publisher in case the name of the magazine is forgotten.

    c. Guardians, trustees, and receivers are filed under the name of the individual or organization for whom the agent is acting and a cross-reference is made and filed under the name of the guardian, receiver, or trustee.

    d. Foreign language spellings of foreign governmental agencies are filed under the English translation and a cross-reference is made and filed under the original spelling.

    e. "See Also" references are cross-references to a business which is a subdivision of another business or to alternative spellings of a business. The original is filed under the name and address of the business and the cross-reference will be the name and address of the company under which the business is a subdivision or each name with alternative spellings.

11. Evaluated to the satisfaction of the instructor.

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UNIT IV

LABELING AND POSITIONING FILE FOLDERS AND GUIDES

TERMINAL OBJECTIVE

After completing this unit, the student will be able to match filing terms with definitions, differentiate between guides and folders, and correctly label and position folders and guides within a file drawer. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student will be able to:

1. Match filing terms with definitions.
2. List six purposes for using file guides.
3. Differentiate between a straight-bottom guide and an eyeleted guide.
4. List four purposes for using file folders.
5. Match title of file folders with description of file folders.
6. List and describe the four types of folders constructed for special needs.
7. State the two purposes for having tabs on guides and folders.
8. List six types of tabs on guides and five types of tabs on folders.
9. State the two purposes for using file folder labels.
10. State two purposes for using file drawer labels and describe the difference between single caption and double caption labels.
11. List and describe four types of labels.
12. List five techniques for preparing folder labels.

13. Cite the four purposes for positioning guides.
14. Match the four file drawer positions with correct guide title.
15. Demonstrate the ability to type captions on folder labels in correct indexing order.

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UNIT IV

LABELING AND POSITIONING FILE FOLDERS AND GUIDES

SUGGESTED ACTIVITIES

I. Instructor:

  A. Provide students with objective sheet.

  B. Discuss objective sheet.

  C. Provide students with information sheet.

  D. Discuss information sheet.

  E. Show transparencies and discuss the different type folders, guides, tabs, and file drawers.

  F. Explain difference between a folder and a guide and explain that each system of filing requires different types of folders and guides.

  G. Demonstrate labeling techniques.

  H. Provide job sheet.

  I. Give test and evaluate results.

II. Student:

  A. Read objective sheet.

  B. Study information sheet.

  C. Participate in class demonstrations and discussions.

  D. View transparencies.

  E. Complete job sheet.

  F. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objectives

- B. Information sheet
- C. Transparency masters
    - 1. IV-TM-1--Folders
    - 2. IV-TM-2--Guides
    - 3. IV-TM-3--Tabs on Guides
    - 4. IV-TM-4--Tabs on Folders
    - 5. IV-TM-5--File Drawer
    - 6. IV-TM-6--Folder Positions
- D. Folders, guides and labeling materials
- E. Job sheet
    - 1. Job Sheet #1--Typing and Alphabetizing Labels
- F. Answers to job sheet
- G. Test
- H. Answers to test

II. References:

A. Bassett, Ernest D. and David G. Goodman. Business Filing and Records Control. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

B. Bassett, Ernest D. and David G. Goodman. Office Filing Procedures, Practice Set. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

C. Kahn, Gilbert, et al. Gregg Quick Filing Practice. Dallas, Texas: Gregg Division, McGraw-Hill Book Company, 1965.

D. Meehan, James R., et al. Clerical Office Procedures. 5th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

E. Meehan, James R., et al. Secretarial Office Procedures. 8th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

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UNIT IV

LABELING AND POSITIONING FILE GUIDES AND FOLDERS

INFORMATION SHEET

I. Definition of terms

   A. Guides--A sheet of heavy cardboard designed with a tab at the top or the side

   B. Folder--A manila container, designed to hold correspondence, which is folded so that the back side extends one-half inch or more above the front

   C. Tab--A projection above the body of the guides or folders on which a caption or title is placed

   D. Caption--A title, a name, an alphabetic letter, or a number placed on the tab designating the record divisions or contents

   E. Cut--The size of the tab on the back of the folder

   F. Label--A sticker that is attached to the tab of a guide on which a caption or title has been placed

   G. Position--The location of a guide or folder tab from left to right on the file drawer

II. Purposes of using file guides

   A. Separates file drawer into different sections for faster retrieval.

   B. Supports records to prevent bowing and sagging.

   C. Indicates major divisions of alphabet.

   D. Identifies an individual or firm with whom there is a considerable amount of correspondence.

   E. Identifies special sections (i.e., applications, bids, speeches).

   F. Identifies section reserved for names that have the same first indexing unit (i.e., Jones, Smith, Thomas).

III. Types of guides

   A. Straight bottom guide--Bottom of guide is straight across allowing it to be removed from files.

   B. Eyeleted guide--Has eyelet in the center so a rod can pass through which secures the guide in place.

IV. Purposes for using file folders

   A. Holds both incoming and outgoing correspondence within the file drawer.

   B. Compiles records of individual or firms with whom there is a considerable amount of correspondence.

   C. Groups together correspondence from individuals or firms with whom there is less than five pieces of correspondence.

   D. Provides special place within the file drawer for specific subjects (i.e., bids, contracts, payroll, etc.).

V. Types of folders

   A. Individual--Contains several records from one person or firm--Papers arranged chronologically with most recent date in front.

   B. Miscellaneous--Contains papers from all correspondents whose correspondence is limited in volume (less than five papers).

      1. Papers are arranged alphabetically.

      2. Papers are arranged chronologically with most recent date in front.

   C. Special--Contains papers pertaining to subdivisions of a special subject (i.e., bids, contracts, payroll).

      1. Papers are arranged alphabetically.

      2. Papers are arranged chronologically with most recent date in front.

VI. Folders constructed for special needs

   A. Suspension folders--Hangs on metal rods at the side of the drawer to prevent sagging.

   B. Binder folder--Has fasteners which bind papers inside them (used frequently in legal and accounting offices).

C. Classification folders--Used to organize a group of papers within a folder. A personal folder would contain records such as personal data sheet, letters of application, employment records, certificates earned, payroll slips, etc.

D. Bellows folder--Folders which have high gussets of manila or cloth on the sides and bottom and a drop front designed to hold bulky correspondence.

VII. Purpose for having tabs on guides and folders

A. Serves as place to put the caption or title of the folder contents to expedite filing and retrieval of records.

B. The tab cut identifies the position the guide or folder holds within the file drawer.

VIII. Types of tabs

A. Guides

1. Plain tab
2. Celluloid reinforced tab
3. Celluloid insertable label holder
4. Metal tabbed guide
5. Angled label holder
6. Plastic label holder

B. Folders

1. Straight edge or full cut--Extends full length of folder.
2. Half cut--Tab extends one-half the length of the folder.
3. Third cut--Tab extends one-third the length of the folder.
4. Two-fifths cut--Tab extends two-fifths of the length of the folder.
5. One-fifth cut--Tab extends one-fifth of the length of the folder.

IX. Purpose of using file folder labels

   A. Identifies the alphabetic section.

   B. Identifies the contents of the folder.

X. Purpose of using file drawer labels

   A. Identification of drawer contents.

   B. Identifies alphabetic limitations of records within.

      1. Single caption label has single letters (i.e., L indicating where alphabetic records begin).

      2. Double or closed caption has two letters L and M separated by a hyphen (L-M) to indicate where the alphabetic sequence begins and ends.

XI. Types of caption labels

   A. Pre-printed--Letter of the alphabet or a caption already stamped on the guide or folder

   B. Metal clip-on--Designed to attract special attention

   C. Gummed--Requires moistening and pressure

   D. Adhesive--Back peels off

XII. Techniques for preparing folder labels

   A. Type caption in indexing order.

   B. Omit punctuation other than hyphen or dash.

   C. Start at same place on each label (usually two spaces from left edge of tab).

   D. Type just below center fold.

   E. Use upper and lower case type.

XIII. Purpose for positioning guides

   A. More organized system

   B. Expedite location of records

   C. Standardized procedures

   D. Faster retrieval

   E. Helps eliminate filing mistakes

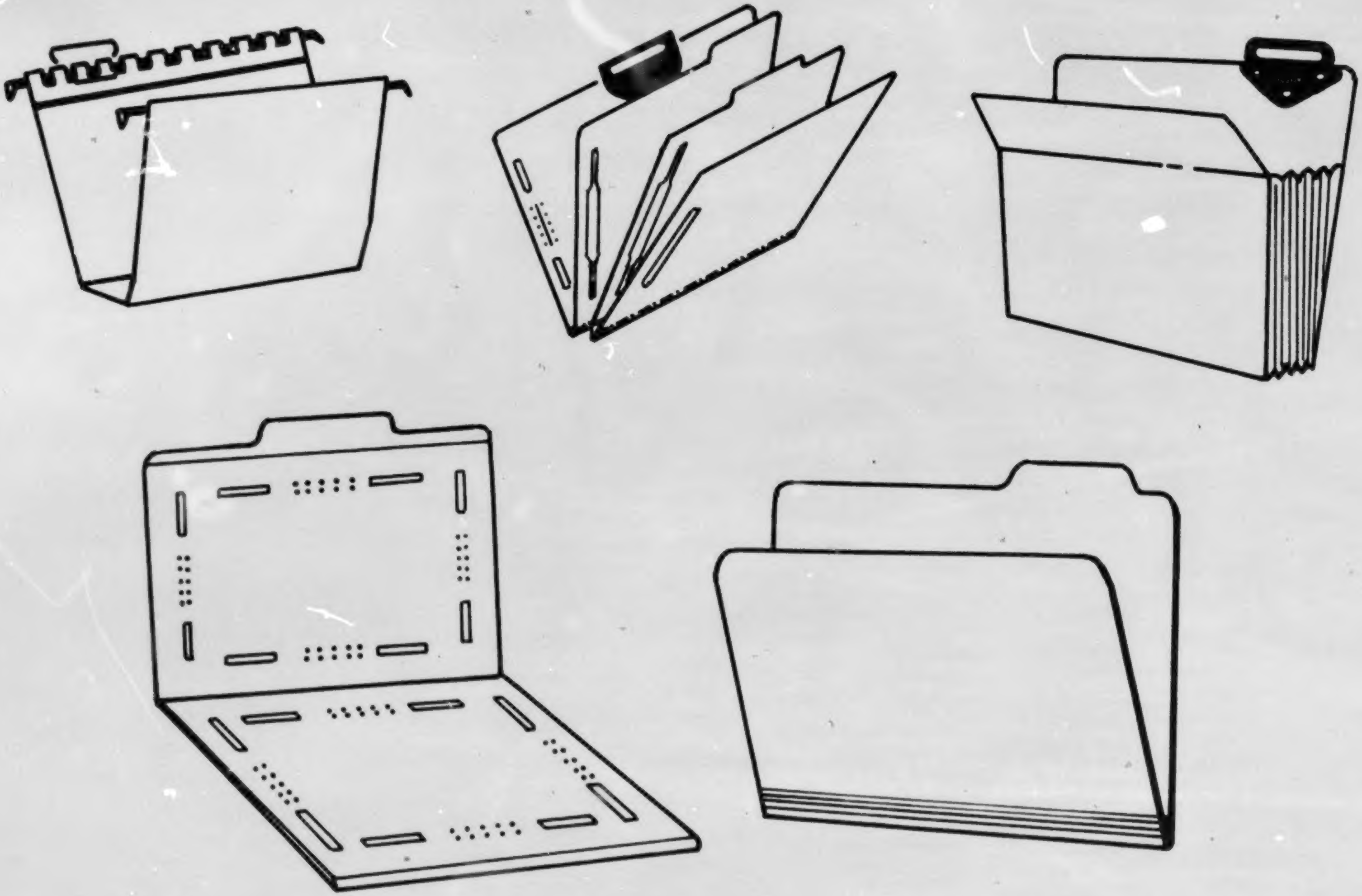
XIV. Types of positions

A. First positon: Primary guide--Extreme left of file drawer

B. Second position: Special guides--Second position from left of the file drawer

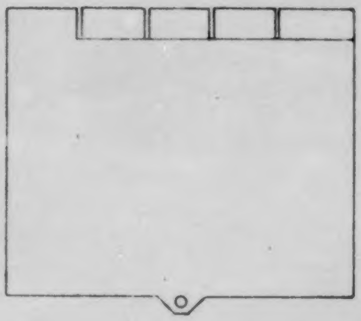
C. Third position: Special guides or individual folders--Third position from the left of the file drawer

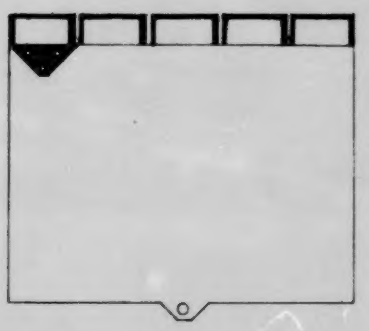
D. Fourth position: Secondary or out-guides--Fourth position from the left edge of the file drawer

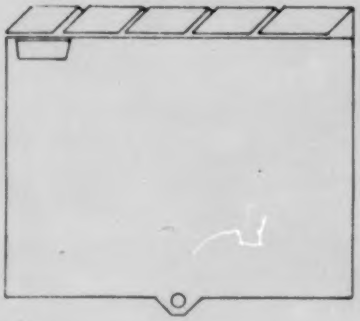


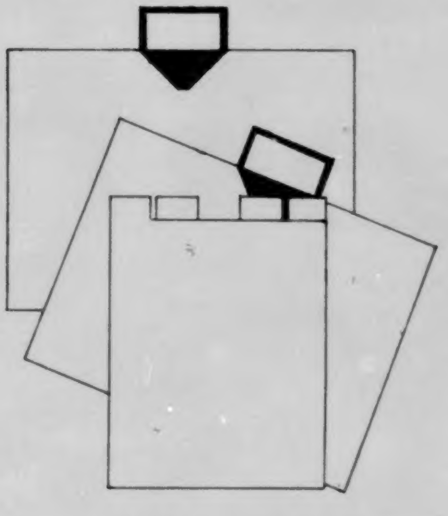
FOLDERS

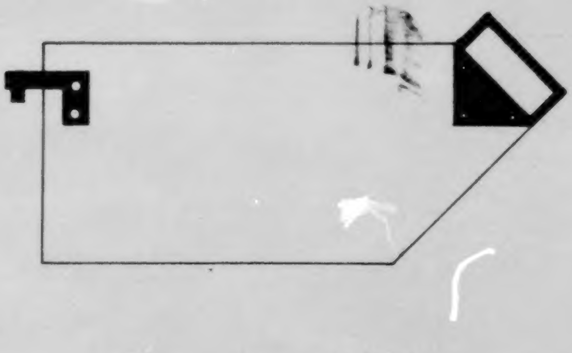
GUIDES











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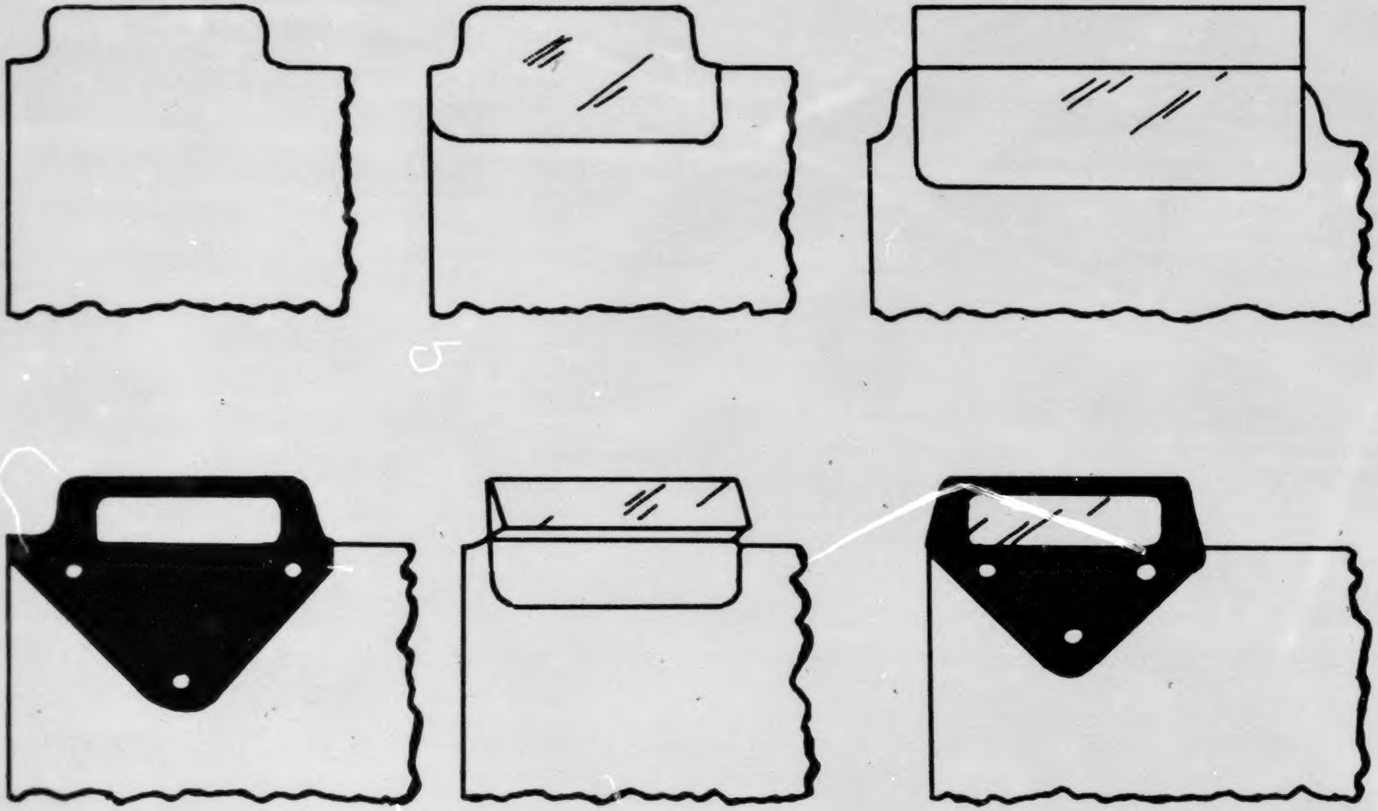

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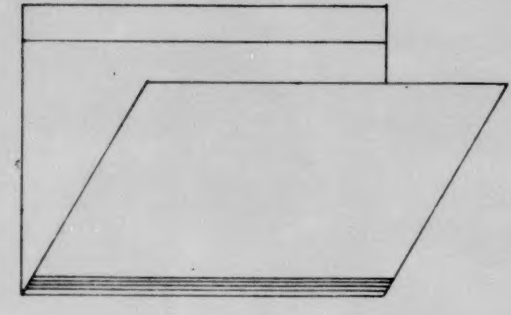
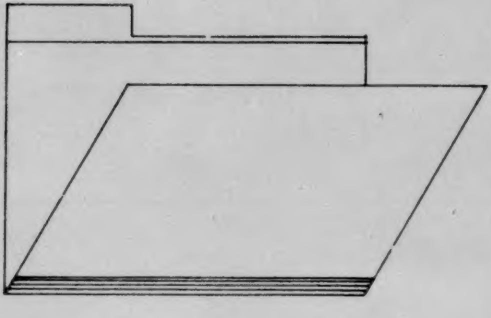
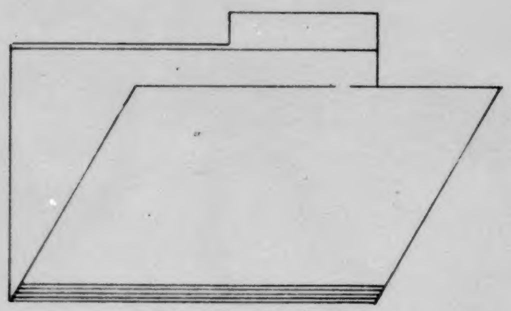
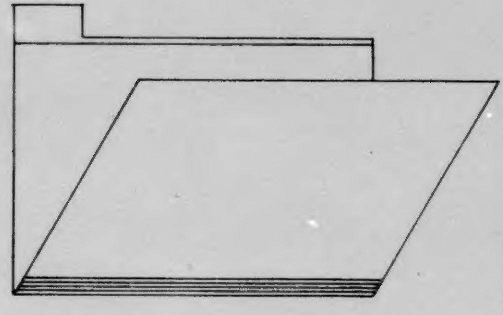
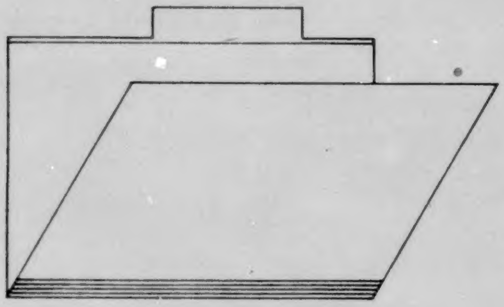
TABS ON FOLDERS

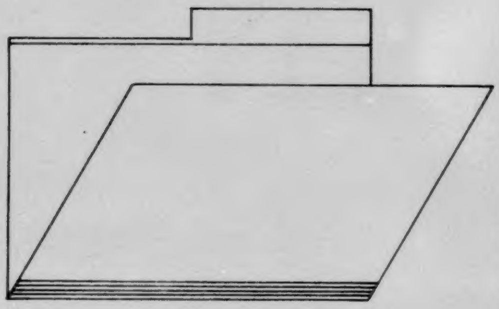


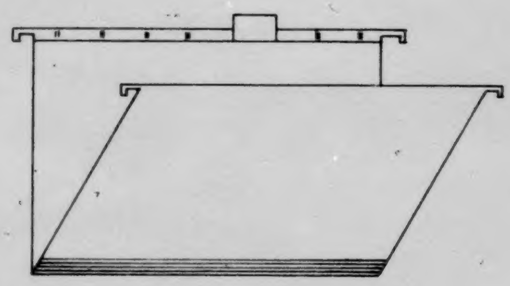




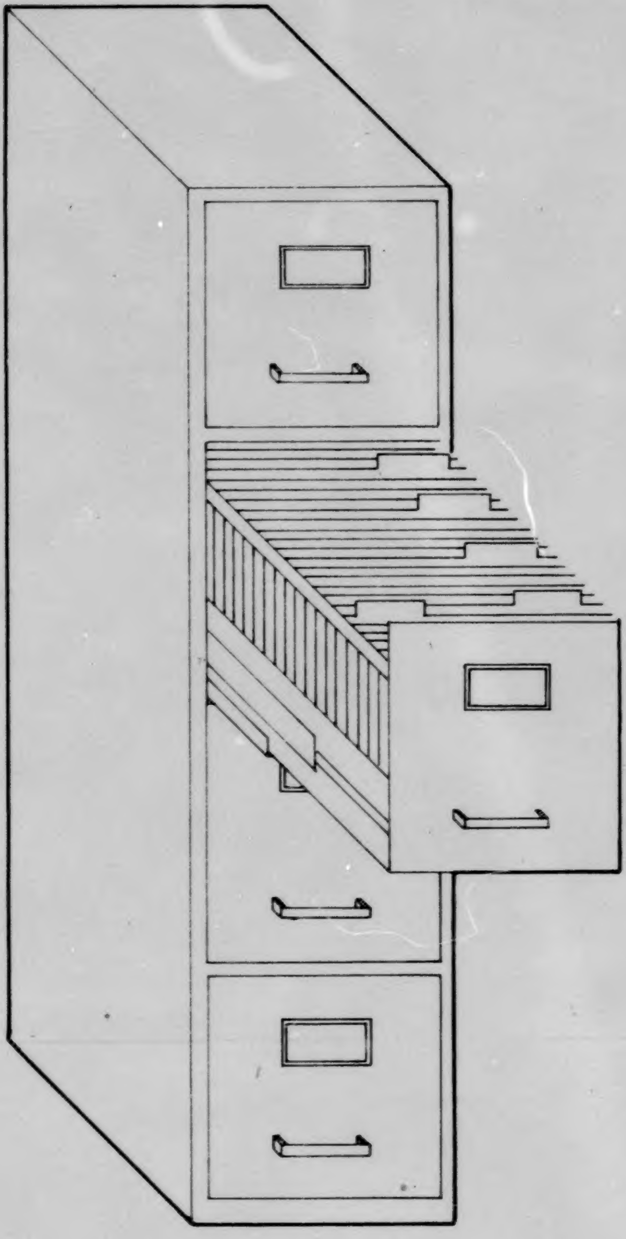




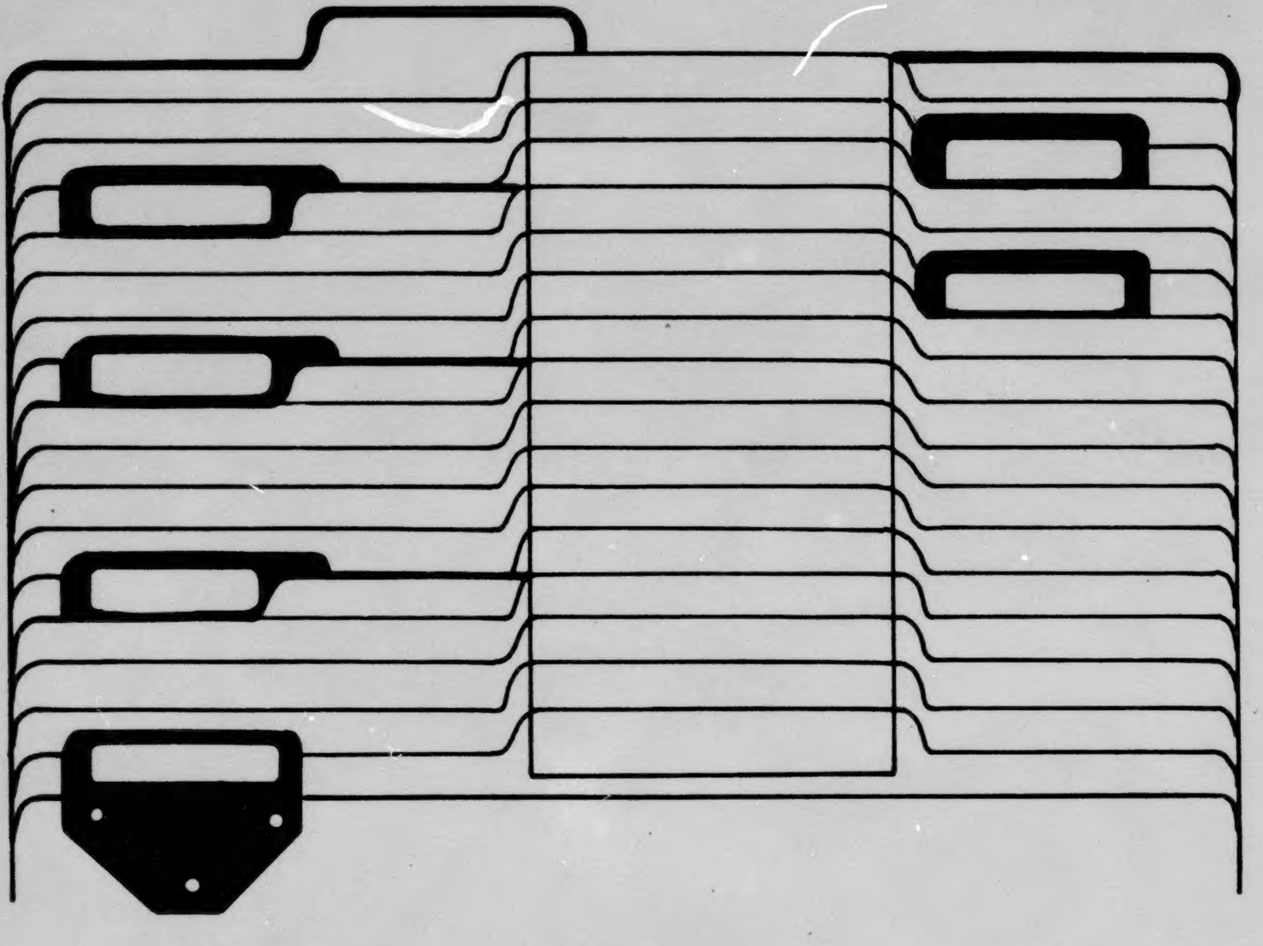




FILE DRAWER



FOLDER POSITIONS



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UNIT IV

LABELING AND POSITIONING FILE FOLDERS AND GUIDES

JOB SHEET #1--TYPING AND ALPHABETIZING LABELS

I. Tools and equipment needed:

   A. 12 file labels

   B. Typewriter or pen

II. Directions: Type the following captions on folder labels in correct indexing order. Arrange in alphabetical order.

   a. Harrison and Associates
   b. Tom Handler Furniture and Appliances
   c. Harrison Carpets
   d. Harbor One Marina Cafe
   e. J. C. Hawthorne Service Station
   f. Kenneth Hancock
   g. Hayes & Stolz Industrial Supply Co.
   h. Mrs. J. W. Hastings
   i. Handley - Meadowbrook Plumbing
   j. Heart Disease Research Foundation
   k. Hatley Distributing Company
   l. Hawk - Part Systems

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UNIT IV

LABELING AND POSITIONING FILE FOLDERS AND GUIDES

ANSWERS TO JOB SHEET

Job Sheet #1

1. (f) Hancock, Kenneth
2. (b) Handler, Tom, Furniture and Appliances
3. (i) Handley - Meadowbrook Plumbing
4. (d) Harbor One Marina Cafe
5. (a) Harrison and Associates
6. (c) Harrison Carpets
7. (h) Hastings, J. W. (Mrs.)
8. (k) Hatley Distributing Company
9. (l) Hawk - Part Systems
10. (e) Hawthorne, J. C., Service Station
11. (g) Hayes & Stolz Industrial Supply Co.
12. (j) Heart Disease Research Foundation

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UNIT IV

LABELING AND POSITIONING FILE FOLDERS AND GUIDES

UNIT TEST

1. Match filing terms with their definitions.

_____a. Guide
_____b. Folder
_____c. Tab
_____d. Caption
_____e. Cut
_____f. Label
_____g. Position

1. The size of the tab on the back of the folder
2. A manila container designed to hold correspondence
3. A title, a name, an alphabetic letter, or a number placed on the tab designating the record divisions or contents
4. A sheet of heavy cardboard designed with a tab at the top or the side
5. The location of a guide or folder tab from left to right of the file drawer
6. A projection above the body of the guides and folders on which a caption is placed
7. A sticker that is attached to the tab of a guide on which a caption or title has been placed

2. List six purposes for using file guides.

a.

b.

c.

d.

e.

f.

3. Differentiate between a straight-bottom guide and an eyeleted guide.

4. List four purposes for using file folders.

   a.

   b.

   c.

   d.

5. Match title of file folders with correct description.

   _____a. Individual

   _____b. Miscellaneous

   _____c. Special

   1. Contains papers pertaining to subdivisions of a special subject

   2. Contains several papers from one individual or firm

   3. Contains papers from all correspondents where correspondence is limited in volume

6. List and describe the four types of folders constructed for special needs.

   a.

   b.

c.

d.

7. State the two purposes for having tabs on guides and folders.

   a.

   b.

8. A. List six types of tabs on guides and five types of tabs on folders.

      a.

      b.

      c.

      d.

      e.

      f.

   B. a.

      b.

      c.

      d.

      e.

9. State the two purposes for using file folder labels.

   a.

   b.

10. State two purposes for using file drawer labels and describe the difference between single caption and double caption labels.

    a.

    b.

11. List and describe four types of labels.

    a.

    b.

    c.

    d.

12. List five techniques for preparing folder labels.

    a.

    b.

    c.

    d.

    e.

13. Cite the five purposes for positioning guides.

a.

b.

c.

d.

e.

14. Match the four file drawer positions with their correct guide title.

_____a. First position 1. Special or individual guide

_____b. Second position 2. Secondary or out guide

_____c. Third position 3. Primary guide

_____d. Fourth position 4. Miscellaneous guide

15. Demonstrate the ability to type captions on folder labels in correct indexing order.

(NOTE: If this skill has not been accomplished prior to the test, ask the instructor when it should be completed.)

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UNIT IV

LABELING AND POSITIONING FILE FOLDERS AND GUIDES

ANSWERS TO UNIT TEST

1. __4__ a.

   __2__ b.

   __6__ c.

   __3__ d.

   __1__ e.

   __7__ f.

   __5__ g.

2. a. Separates the file drawer into different sections for faster retrieval.

   b. Supports records to prevent bowing and sagging.

   c. Indicates major divisions of alphabet.

   d. Identifies an individual or firm with whom there is a considerable amount of correspondence.

   e. Identifies special sections (i.e., applications, bids, speeches).

   f. Identifies section reserved for names that have the same first indexing unit (i.e., Jones, Smith, Thomas).

3. A straight-bottom guide is straight across the bottom which allows it to be removed from the file drawer, while an eyeleted guide has a hole in the center at the bottom so a rod can be inserted through the drawer and guide, thus securing the guide in place.

4. a. Holds both incoming and outgoing correspondence within the file drawer.

   b. Compiles records from individuals or firms with whom there is a considerable amount of correspondence.

   c. Groups together correspondence from individuals or firms with whom there is less than five pieces of correspondence.

d. Provides a special place within the file drawer for specific subjects.

5. __2__ a.

__3__ b.

__1__ c.

6. a. Suspension folders--hang on metal rods at the side of the drawer to prevent sagging

b. Binder folder--has fasteners which bind papers inside them

c. Classification folder--used to organize a group of papers within a folder

d. Bellows folder--Folders which have high gussets of manila or cloth on the side and bottom and a drop front designed to hold bulky correspondence

7. a. Serves as a place to put the caption or title of the folder contents to expedite filing and retrieval of records

b. Identifies the position the guide or folder holds within the file drawer

8. A. Guides

a. Plain tab

b. Celluloid reinforced tab

c. Celluloid insertable label holder

d. Metal tabbed

e. Angled label holder

f. Plastic label holder

B. Folders

a. Full cut or straight edge

b. Half-cut

c. Third-cut

d. Two-fifths cut

e. One-fifth cut

9. a. Identifies the alphabetic section

   b. Identifies the contents of the folder

10. a. Identification of drawer contents

    b. Identifies alphabetic limitations of records within

    The single caption label has single letter of the alphabet indicating where the alphabetic records begin. The double caption label has two letters separated by a hyphen indicating where the alphabetic sequence begins and ends.

11. a. Pre-printed letters of the alphabet or a caption already printed.

    b. Metal clip--designed to attract special attention

    c. Gummed--requires moistening and pressure

    d. Adhesive--back peels off

12. a. Type caption in indexing order.

    b. Omit punctuation other than hyphen.

    c. Start at same place on each label (two spaces from left edge of tab).

    d. Type just below center fold.

    e. Use upper and lower case type.

13. a. More organized system

    b. Expedite location of records

    c. Standardized procedures

    d. Faster retrieval

    e. Helps eliminate mistakes

14. __3__ a.

    __4__ b.

    __1__ c.

    __2__ d.

15. Evaluated to the satisfaction of the instructor.

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UNIT V

ESTABLISHING AN ALPHABETIC CORRESPONDENCE FILING SYSTEM

INFORMATION SHEET

I. Definition of terms used in filing correspondence

   A. Incoming correspondence--Communications received from outside the firm (i.e., letters, reports, contracts, bids, job applications, telegraphs, canceled checks)

   B. Outgoing correspondence--Communications sent to individuals or firms outside the home company (i.e., letters, financial reports, price quotations, brochures, purchase orders)

   C. Internal correspondence--Communications within a company from department to department (i.e., interoffice memos, notices, company policy changes, reports)

   D. Correspondence files--Files designed to accommodate correspondence

   E. Classifying--Arranging systematically in groups or categories

   F. Active file--Files that are used frequently

   G. Inactive file--Files that are used less than fifteen times a year

   H. Filing system--Placing documents or materials in a folder or container according to a plan or a system. Arranging materials systematically

   I. Record--Official documents used within the company

   J. System--An organized or established procedure; a manner of classifying in groups or categories. A plan of filing designed by a manufacturer of filing equipment

   K. Vertical filing--Standing papers on edge in file folders

   L. Release mark--Notation showing that the record has received the proper attention and is ready to be filed

II. The importance of establishing a filing system

A. Filed records are the memory of the firm. Records are important to the continued successful operation of the firm; therefore, an organized filing system is essential. Haphazard collection of records and filing procedures cause delays in retrieval time and can be costly to a company. A company needs fixed policies governing the filing of records.

III. Steps in receiving and handling incoming correspondence

A. Route correspondence to the correct recipient within the company.

B. Check for return address on correspondence. (If none, clip return address from envelope to correspondence.)

C. Stamp date and time of receipt on correspondence.

D. Determine action to be taken concerning correspondence.

E. Take action.

F. Mark finished correspondence with release mark notation.

G. Correspondence placed in "to be filed" folder or basket.

IV. Steps in the filing process

A. Collect papers for the files--Any records that may be used again should be filed properly and promptly.

B. Inspect papers--Check to see if all necessary action has been taken and if the records have been initialed or released for filing. Make sure that all papers that are attached together belong together. Remove all paper clips before filing.

C. Index units--Before any piece of correspondence is filed, it should be read or scanned to determine where to file the item. In alphabetic filing, indexing means determining the most important name that is to be used as a basis for filing. In order to index correctly the file clerk must consider the following:

1. Incoming mail--When dealing with original correspondence the name appearing in the letterhead is usually the most important.

a. Original correspondence which has no letterhead is most likely to be called for by the name on the signature line.

   b. When the name of the company and the name of the writer are of equal importance, the company name should be used.

   c. On an incoming letter that is personal in nature, the writer's name should be used for filing purposes.

2. Outgoing mail--On carbon copies of outgoing letters, usually the most important name is in the inside address.

   a. When both the company name and the individual name are used in the inside address of the carbon copy, the material should be filed under the company name.

   b. When a special subject section is used in alphabetic filing, the subject is more important than either the company name or the individual name. The file clerk usually writes the subject name on the upper right hand corner of the correspondence to be filed.

   c. If the subject appears in the body of the correspondence, it is usually the most important for filing purposes.

   d. Often two names appear equally important. Select the name of one under which the paper is to be filed and cross-reference at the time the paper is coded for filing.

D. Coding records--Identify and mark a unit, thus indicating the place it will be filed. Coding saves considerable time and is an important step in the filing procedure. When coding, the name under which the document is to be filed is underlined, circled, checked, or starred with a colored pencil. If desired, the caption may be written in the upper right hand corner. If the correspondence is to be cross-referenced, an "X" should be placed in the margin by the caption.

E. Sort records--Place in alphabetic stacks, then alphabetize each stack in filing order.

F. Filing records--Place the records in the files using the following procedure:

   1. Locate the correct file drawer by reading alphabetic caption label.

   2. Open the drawer and find the caption under which the correspondence is to be filed.

3. Lift the folder and check to be sure the proper folder has been chosen. Compare caption on the correspondence with caption on the label. (If there is no folder prepared, records would be placed in miscellaneous folder.)

4. Place the correspondence in the folder with the heading to the left of the file folder.

5. Replace the folder in the file drawer.

G. Arrange materials in folders

   1. In individual folder, arrange by date with most recent letter in front.

   2. In miscellaneous folder, arrange first alphabetically by name, then by date with most recent letter in front.

   3. In special folder, arrange first alphabetically by name, then by date in each group of names.

V. Advantages of using an alphabetic filing system

   A. The records of an individual or a company are kept together

   B. Permits direct filing and retrieval

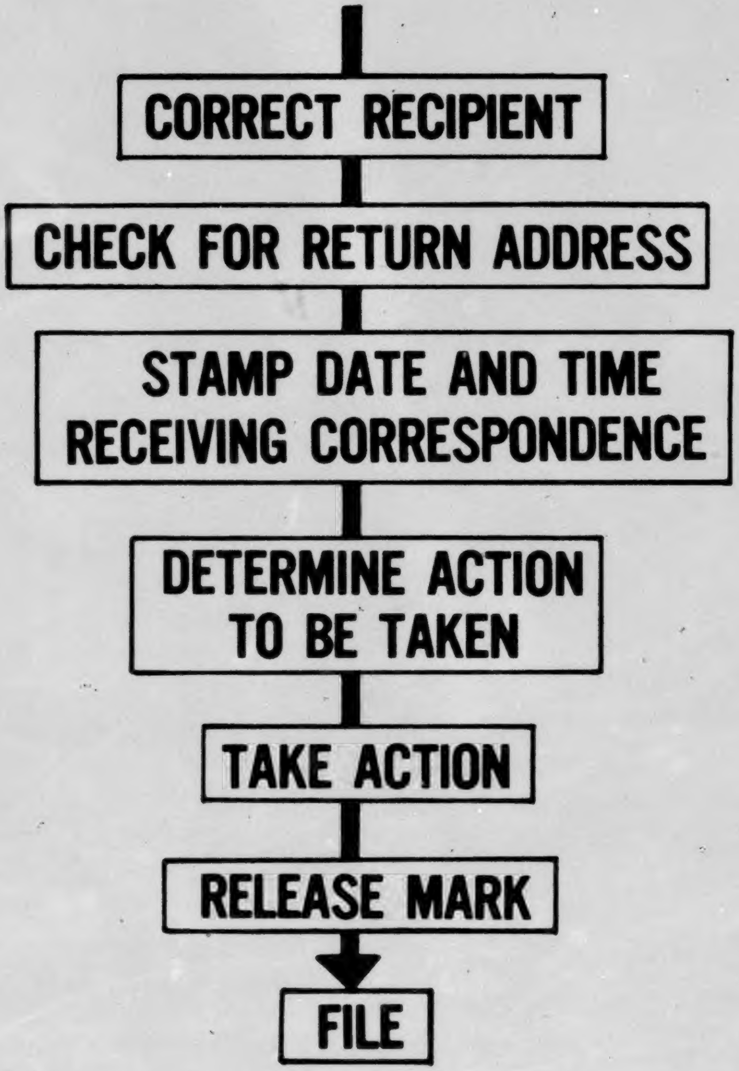
   C. Allows simple arrangement of guides and folders

VI. Disadvantages of using alphabetic filing system

   A. Tendency to file related records in more than one place

   B. Common names cause confusion and congestion

INCOMING MAIL



CORRECT RECIPIENT

CHECK FOR RETURN ADDRESS

STAMP DATE AND TIME RECEIVING CORRESPONDENCE

DETERMINE ACTION TO BE TAKEN

TAKE ACTION

RELEASE MARK

FILE

FILING PROCESS

COLLECT PAPERS

INSPECT PAPERS

INDEX UNITS FOR FILING

CODE

SORT RECORDS

FILE

ALPHABETIC FILING SYSTEM

Advantages

- COMPANY RECORDS KEPT TOGETHER
- PERMITS DIRECT FILING AND RETRIEVAL
- ALLOWS SIMPLE ARRANGEMENT OF GUIDES AND FOLDERS

Disadvantages

- TENDENCY TO FILE RELATED RECORDS IN MORE THAN ONE PLACE
- COMMON NAMES CAUSE CONFUSION AND CONJESTION

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UNIT V

ESTABLISHING AN ALPHABETIC CORRESPONDENCE FILING SYSTEM

ASSIGNMENT SHEET #1--QUESTIONS ABOUT ALPHABETIC CORRESPONDENCE FILING

1. Do carbon copies of outgoing letters need release marks?

2. How are release marks used?

3. How should incoming mail be indexed?

4. How should outgoing mail be indexed?

5. Why is it necessary to cross-reference correspondence?

6. What are the seven steps involved in processing materials to be filed?

   a.

   b.

   c.

d.

e.

f.

g.

7. Is it necessary to have an arrangement of materials within:
   a. an individual folder?
   b. a miscellaneous folder?
   c. a special folder?

   Defend your answer.

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UNIT V

ESTABLISHING AN ALPHABETIC CORRESPONDENCE FILING SYSTEM

ASSIGNMENT SHEET #2--INDEXING AND ALPHABETIZING

I. Index and arrange according to 1st, 2nd, and 3rd indexing unit, the following list of names.

	INDEXING UNITS			
	1	2	3	4
Little John's Wrecking Yard				
James Ray Lindsay				
Leon G. Lindner				
Lindsay Plumbing Co.				
Lino's Restaurant				
R. E. Linton, Jr.				
H. W. Lishy, Real Estate				
Little Brownie Bakers				
Living Unlimited				
James R. Lindsey				
Lincoln National Life Insurance Company				
L. M. Linthicum				
Litho-Offset Supply Inc.				
Little Dude Trailer Company				
Lois's Pottery World				
Lollie's Beauty Shop				

	INDEXING UNITS			
	1	2	3	4
Mr. Louis Coiffures				
Mrs. Fred Lomax (Nell)				
Jane Lomerson (Mrs.)				
Las Robles Mobile Home Park				

II. Using the first indexing units as a basis, arrange the above list in alphabetic order and place in two stacks (Li-Lis and Lit-Low). List the names in the order in which they would be filed.

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UNIT V

ESTABLISHING AN ALPHABETIC CORRESPONDENCE FILING SYSTEM

ASSIGNMENT SHEET #3--EXERCISE IN ESTABLISHING A FILING SYSTEM

Assume that you have been hired as a file clerk for the Jackson Furnace Repair Company, a small business which has never employed a file clerk. You have been asked to establish an alphabetic correspondence filing system so the company can be managed more efficiently. Upon reporting to work you find compiled records stacked throughout the office in drawers, boxes, etc. A file drawer with alphabetic guides has been purchased and installed in the office. After analyzing the situation you realize that a sound, systematic approach to establishing a correspondence file is necessary. You then decide to make the following step-by-step list of things to do which will assist you in reaching your goal.

Step 1. Collect all records which need to be filed.

Step 2. Make a list of the names of individuals or firms with whom your company has corresponded and indicate the number of pieces of correspondence from each.

Step 3. According to the amount of correspondence from each individual or firm, decide whether to file the records in an individual or miscellaneous folder.

Step 4. Decide which, if any, records need to be cross-referenced and make a notation beside each.

Step 5. Make an alphabetical listing of names of those records which go into miscellaneous folders.

Step 6. Make an alphabetical listing of names of those records which go into individual folders.

Step 7. Prepare file folders for miscellaneous records by labeling and positioning miscellaneous folders behind the appropriate file guide within the file drawer.

Step 8. Prepare file folders for individual records by labeling and positioning individual folders behind the appropriate file guide within the file drawer.

Step 9. Make duplicate records of those materials which are to be cross-referenced.

Step 10. File all records in correct file folders.

You have designed what needs to be done and have assigned a step-by-step method for reaching your goal. The next logical thing to do is to complete the steps which you have outlined.

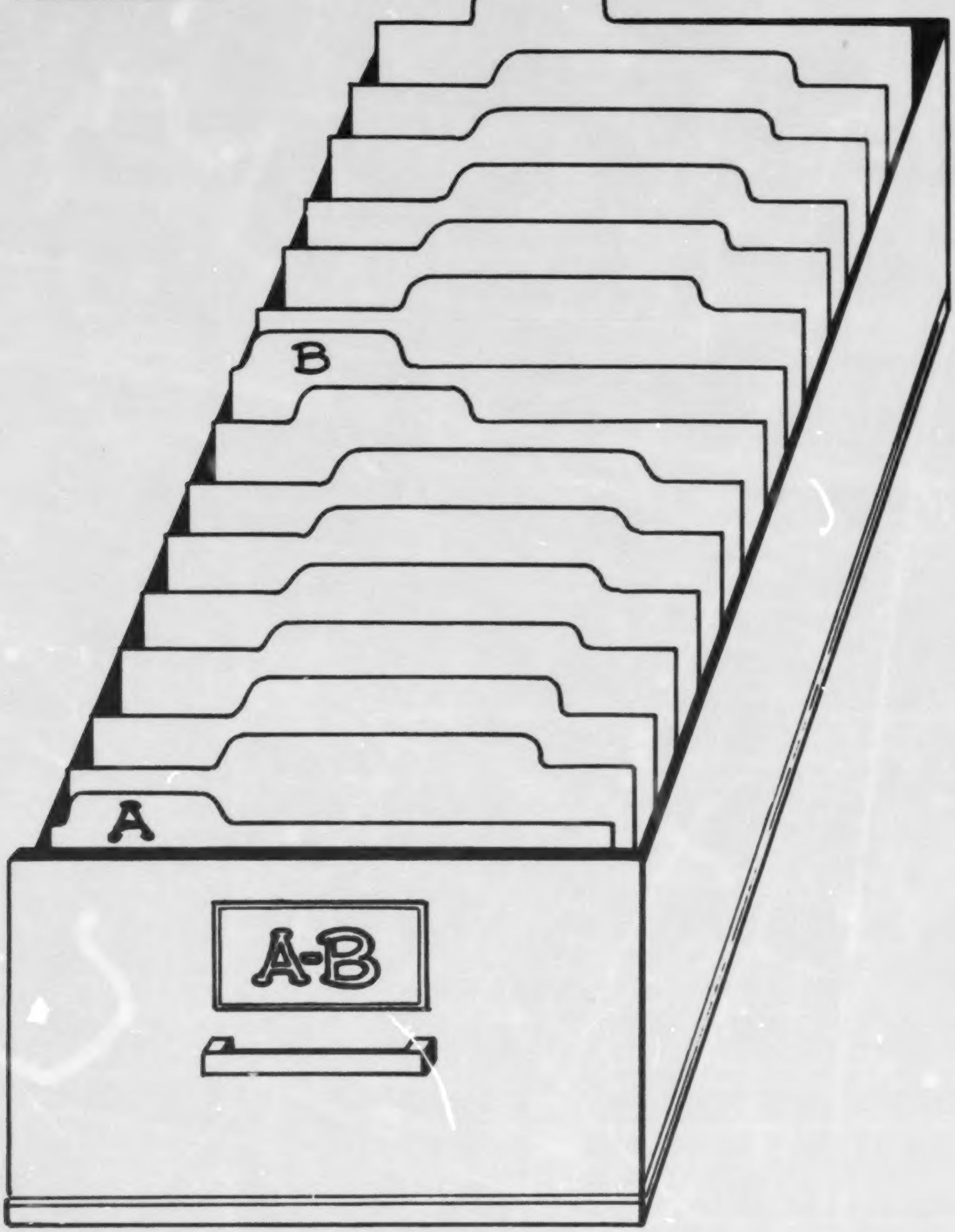
The following exercise is designed to take you through the above steps. Complete each step in the order in which it is listed. (Steps one and two have been completed for you.)

Step 1	Step 2	Step 3-Folder Type		Step 4
		Miscellaneous	Individual	Cross-Reference
Jane Ann Abbott	(2)			
R. J. Barber	(15)			
Border Printing Co.	(22)			
Abbott Fence Co.	(16)			
Gene Alcon	(3)			
Betty J. Barber	(3)			
Mrs. Frank Beacon (Sue)	(1)			
Alcott Printing	(13)			
Jim Almon	(1)			
Altrusa Reward Co.	(3)			
Better Grill Co.	(20)			
Bayfair-Bemming Co.	(2)			
Antone Hearing Aids	(4)			
Jerry Baker	(2)			
Bean-Trass Co.	(4)			
Alstead-Hayden Mill Co.	(2)			

Step 1	Step 2	Step 3-Folder Type		Step 4
		Miscellaneous	Individual	Cross-Reference
Amazon Productions	(12)			
Bill J. Bastron	(3)			
Astes-Fair Co.	(26)			
Bastron, Inc.	(18)			
Bill Blass	(4)			
Betty Anmon	(2)			
Bettings Steel Co.	(17)			
Alloy Metals	(22)			
Astro-Wellman Co.	(14)			
Amtroz-Introz	(3)			

STEP 5	STEP 6
MISCELLANEOUS FOLDER	INDIVIDUAL FOLDER

STEPS 7 and 8



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UNIT V

ESTABLISHING AN ALPHABETIC CORRESPONDENCE FILING SYSTEM

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

1. No.

2. To show that the record received has received attention, action has been taken, and the record is ready to be placed in the file.

3. By the most important filing unit:

    a. usually the name appearing in the letterhead

    b. if no letterhead, name on the signature line

    c. if equal in importance, use company name

4. By the most important filing unit:

    a. usually the name in the inside address

    b. if company name and individual name are used in inside address, use company name

    c. if special subject is used, file by subject name

    d. if names are equally important, select the name of one under which it is to be filed and cross-reference under the other name

5. Because cross-referencing expedites finding records which may be filed more than one way.

6. a. collect papers

    b. inspect papers

    c. index units

    d. code records

    e. sort records

    f. file records

    g. arrange materials in folders

7. Yes, because company business generally revolves around the most recent correspondence; therefore, the most recent should be in front for easier retrieval.

Assignment Sheet #2

I.

INDEXING UNITS				
1st	2nd	3rd	4th	5th
Little	John('s)	Wrecking	Yard	
Lindsay	James	Ray		
Lindner	Leon	G		
Lindsay	Plumbing	Company		
Lino('s)	Restaurant			
Linton	R	E (Jr.)		
Lishy	H	W	Real	Estate
Little	Brownie	Bakers		
Living	Unlimited			
Lindsey	James	R		
Lincoln	National	Life	Insurance	Company
Linthicum	L	M		
Litho	Offset	Supply	Incorporated	
Little	Dude	Trailer	Company	
Lois('s)	Pottery	World		
Lollie('s)	Beauty	Shop		
Mr.	Louis	Coiffures		
Lomax	Nell (Mrs.)			
Lomerson	Jane (Mrs.)			
Los Robles	Mobile	Home	Park	

II.	(Li-Lis)	2	3	4
a.	Lincoln	National	Life	Insurance
b.	Lindner	Leon	G.	
c.	Lindsay	James	Ray	
d.	Lindsay	Plumbing	Co.	
e.	Lindsey	James	R.	
f.	Lino('s)	Restaurant		
g.	Linthicum	L.	M.	
h.	Linton	R.	E. (Jr.)	
i.	Lishy	H.	W.	Real Estate
	(Lit-Low)			
j.	Litho	Offset	Supply	Inc.
k.	Little	Brownie	Bakers	
l.	Little	Dude	Trailer	Company
m.	Little	John('s)	Wrecking	Yard
n.	Living	Unlimited		
o.	Lois('s)	Pottery	World	
p.	Lollie('s)	Beauty	Shop	
q.	Lomax	Nell (Mrs.)		
r.	Lomerson	Jane (Mrs.)		
s.	Los Robles	Mobile	Home	Park

NOTE: Mr. Louis Coiffures is not included since it does not fall in the Li-Lis or Lit-Low range.

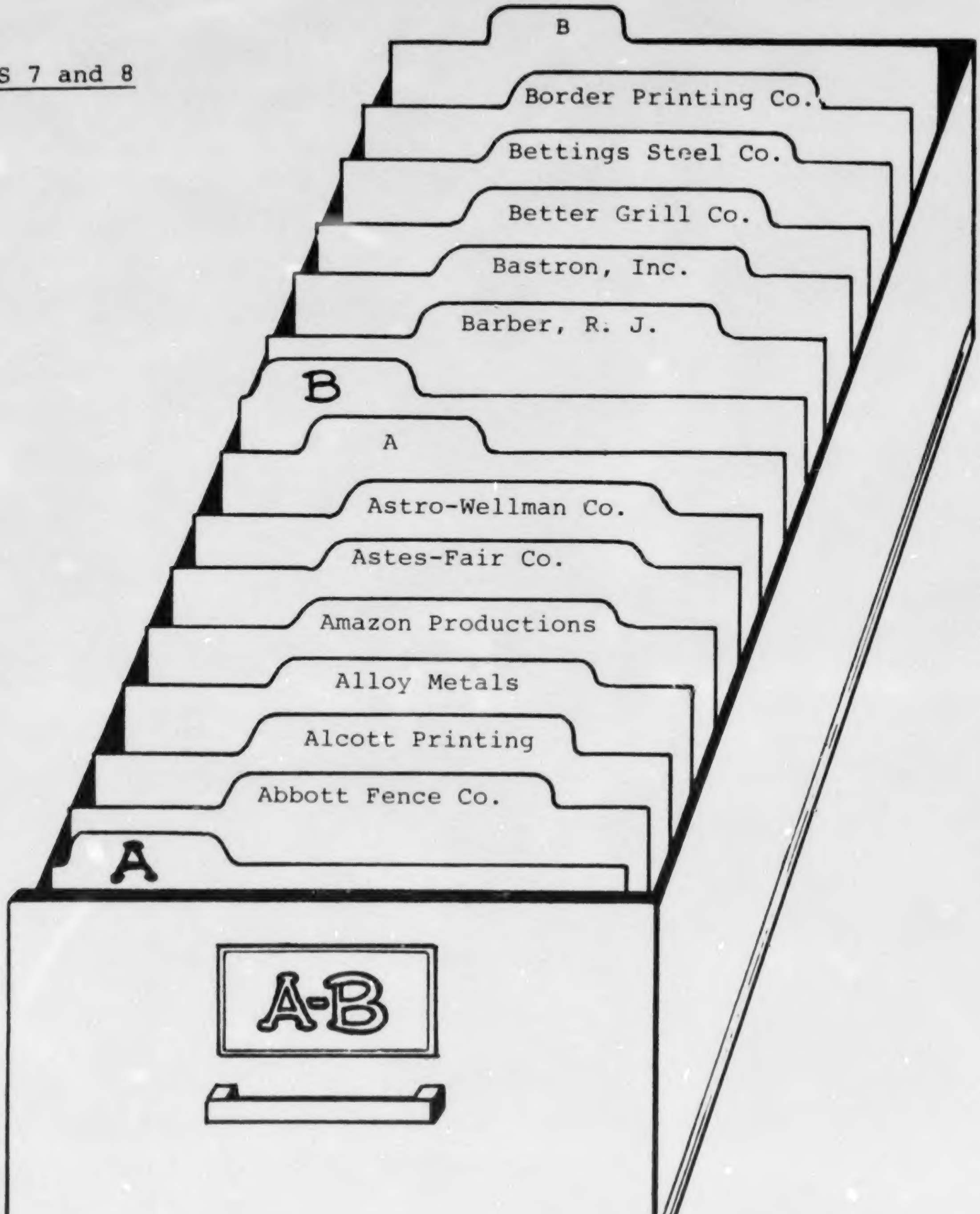
Assignment Sheet #3

	Step 3-Folder Type		Step 4
	Miscellaneous	Individual	Cross-Reference
Jane Ann Abbott	X		
R. J. Barber		X	
Border Printing Co.		X	
Abbott Fence Co.		X	
Gene Alcon	X		
Betty J. Barber	X		
Mrs. Frank Beacon (Sue)	X		X
Alcott Printing		X	
Jim Almon	X		
Altrusa Reward Co.	X		
Better Grill Co.		X	
Bayfair-Bemming Co.	X		X
Antone Hearing Aids	X		
Jerry Baker	X		
Bean-Trass Co.	X		X
Alstead-Hayden Mill Co.	X		X
Amazon Productions		X	
Bill J. Bastron	X		
Astes-Fair Co.		X	X
Bastron, Inc.		X	
Bill Blass	X		
Betty Anmon	X		

	Step 3-Folder Type Miscellaneous	Step 3-Folder Type Individual	Step 4 Cross-Reference
Bettings Steel Co.		X	
Alloy Metals		X	
Astro-Wellman Co.		X	X
Amtroz-Introz	X		X

STEP 5 MISCELLANEOUS	STEP 6 INDIVIDUAL
Abbott	Abbott Fence Co.
Alcon	Alcott Printing
Almon	Alloy Metals
Alstead	Amazon Productions
Altrusa	Astes-Fair Co.
Amtroz	Astro-Wellman Co.
Anmon	Barber, R. J.
Antone	Bastron, Inc.
Baker	Better Grill Co.
Barber	Bettings Steel Co.
Bastron	Border Printing Co.
Bayfair	
Beacon	
Bean	
Blass	

STEPS 7 and 8



STEPS 9 and 10 ANSWERED IN DIAGRAM

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UNIT V

ESTABLISHING AN ALPHABETIC CORRESPONDENCE FILING SYSTEM

UNIT TEST

1. Match alphabetic correspondence filing system terms in Column 1 with their correct definitions in Column II. Place the number defining the term (Column II) in the blank at the left of Column I.

Column I

_____a. incoming correspondence

_____b. outgoing correspondence

_____c. internal correspondence

_____d. correspondence files

_____e. classifying

_____f. active file

_____g. inactive file

_____h. filing system

_____i. record

_____j. system

_____k. vertical filing

_____l. release mark

Column II

1. Placing documents or materials in a folder or container according to a plan or system Arranging materials systematically
2. Communications sent to individuals or firms outside the home company (i.e., letters, financial reports)
3. Notation showing that the record has received the required attention and is ready to be filed
4. Official documents used within the company
5. Communications within a company from department to department (i.e., interoffice memos, notices, company policy changes)
6. An organized or established procedure; a manner of classifying in groups or categories A plan of filing designed by a manufacturer of filing equipment
7. Communication received from outside the firm
8. Files that are used frequently

9. Arranging systematically in groups or categories

10. Files designed to accomodate correspondence

11. Files that are used less than fifteen times a year

12. Standing papers on edge in file folders

2. State the importance of establishing an alphabetic correspondence filing system.

3. Arrange in correct sequence (1-7) the steps involved in receiving and handling incoming correspondence.

_____a. Correspondence placed in the "to be filed" box.

_____b. Stamp date and time of receipt on correspondence.

_____c. Route correspondence to the correct recipient within the company.

_____d. Determine action to be taken concerning correspondence.

_____e. Check for return address on correspondence (If none, clip return address from envelope and attach to correspondence).

_____f. Take action.

_____g. Mark finished correspondence with release mark notation.

4. Identify true statements concerning the steps involved in the filing process by placing a check (✓) in the column to the left of the statements which are true.

_____a. The first step in the filing process is to collect all records that may be used again and file properly.

_____b. Inspecting records to be filed means reading very carefully each piece of correspondence before placing in the file drawer.

_____c. Indexing involves determining the most important name that is to be used as a basis for filing.

_____d. When dealing with original correspondence the name appearing on the letterhead is usually the most important.

_____e. Original correspondence which has no letterhead is likely to be called for by the name on the signature line.

_____f. On carbon copies of outgoing correspondence the most important name is usually on the signature line.

_____g. When both the company name and the individual name are used in the inside address of the carbon copy the material should be filed in the miscellaneous folder.

_____h. On an incoming letter that is personal in nature, the writer's name should be used for filing purposes.

_____i. If a subject appears in the body of the correspondence, it is usually the most important for filing purposes.

_____j. If two names appear equally important, select the name under which the paper is to be filed and cross-reference the other name at the time the paper is coded for filing.

_____k. Coding involves writing numbers in the left margin concerning the type tab that is to be used.

_____l. Sorting records is the last step in the filing procedure and involves sorting the materials into two stacks so two people can do the filing.

_____m. Filing involves locating the correct file folders, placing record with heading to be left inside the folder and returning folder to the correct position in the file drawer.

5. State three advantages of using an alphabetic filing system.

   a.

   b.

   c.

6. State two disadvantages of using an alphabetic filing system.

   a.

   b.

7. Demonstrate the ability to index, alphabetize, and arrange file folders in a file drawer.

   (NOTE: If this skill has not been accomplished prior to the test, ask the instructor when it should be completed.)

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UNIT V

ESTABLISHING AN ALPHABETIC CORRESPONDENCE FILING SYSTEM

ANSWERS TO TEST

1. 7 a.

2 b.

5 c.

10 d.

9 e.

8 f.

11 g.

1 h.

4 i.

6 j.

12 k.

3 l.

2. Filed records constitute the memory of the firm. Records are important to the continued successful operation of the firm; therefore, an organized filing system is essential. Haphazard collection of records and filing procedures cause costly delays in retrieval time. A company needs fixed policies governing the filing of records.

3. 7 a.

3 b.

1 c.

4 d.

2 e.

5 f.

6 g.

4. ✓ a.

   _____ b.

   ✓ c.

   ✓ d.

   ✓ e.

   _____ f.

   _____ g.

   ✓ h.

   ✓ i.

   ✓ j.

   _____ k.

   _____ l.

   ✓ m.

5. a. Records of an individual or firm are kept together.

   b. Permits direct filing and retrieval.

   c. Allows simple arrangement of guides and folders.

6. a. Tendency to file related records in more than one place.

   b. Common names cause confusion and congestion.

7. Evaluated to the satisfaction of the instructor.

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UNIT VI

UTILIZING CHARGE-OUT AND FOLLOW-UP SYSTEMS IN FILING

TERMINAL OBJECTIVE

After completing this unit the student will be able to cite the purpose of charging-out and following-up, identify materials and equipment used, and demonstrate the ability to carry out the steps involved in a charge-out and follow-up system. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit the student will be able to:

1. Match filing terms with definitions.
2. Cite the purposes of a charge-out and follow-up system.
3. List four methods of requesting records from files.
4. Describe the kind of information that is needed on a file requisition and state the use of requisitions.
5. List four types of requisition forms used in recording requests.
6. State the use of OUT forms.
7. Cite the descriptive terms of the three types of OUT forms.
8. State the use of OUT guides.
9. Describe two types of OUT guides.
10. Cite the use of OUT folders.
11. Describe the three types of OUT folders most frequently used.
12. State the purpose and use of an ON-CALL (wanted) card.
13. Cite the manner in which confidential papers are protected and secured.

14. Explain how tickler files are used.
15. Describe the arrangement of tickler files.
16. Match tickler file terms with correct definitions.
17. Sequence the steps involved in a charge-out and follow-up system.

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UNIT VI

UTILIZING CHARGE-OUT AND FOLLOW-UP SYSTEMS IN FILING

SUGGESTED ACTIVITIES

I. Instructor:

   A. Provide objective sheet.

   B. Discuss objective sheet.

   C. Provide information sheet.

   D. Discuss information sheet.

   E. Show transparencies.

   F. Provide assignment sheet.

   G. Discuss assignment sheet.

   H. Give test and evaluate results.

II. Student:

   A. Read objective sheet.

   B. Participate in discussion of objective sheet.

   C. Read information sheet.

   D. Participate in discussion of information sheet.

   E. View transparencies.

   F. Read assignment sheet.

   G. Complete assignment sheet.

   H. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objectives

B. Information sheet

C. Transparency masters

1. VI-TM-1--Requisition Card or Slip, and OUT Card

2. VI-TM-2--Slotted OUT Card

3. VI-TM-3--OUT Sheet

4. VI-TM-4--OUT Guide

5. VI-TM-5--OUT Folders and OUT Folders with Pockets

6. VI-TM-6--ON-CALL

7. VI-TM-7--Tickler File

D. Assignment sheet

1. Assignment Sheet #1--Questions About Charging-Out and Following-Up

E. Answers to assignment sheet

F. Test

G. Answers to test

II. References:

A. Bassett, Ernest D. and David G. Goodman. Business Filing and Records Control. Cincinnati, Ohio: South-Western Publishing Co., 1974.

B. Bassett, Ernest D. and David G. Goodman. Office Filing Procedures, Practice Set. Cincinnati, Ohio: South-Western Publishing Co., 1974.

C. Kahn, Gilbert, et al. Gregg Quick Filing Practice. Dallas, Texas: Gregg Division, McGraw-Hill Book Company, 1965.

D. Meehan, James R., et al. Clerical Office Procedures. 5th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

E. Meehan, James R., et al. Secretarial Office Procedures. 8th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

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UNIT VI

UTILIZING CHARGE-OUT AND FOLLOW-UP SYSTEMS IN FILING

INFORMATION SHEET - SECTION 1

I. Terms and definitions

  A. Charge system--A method of accounting for records that have been taken from the files

  B. Charge-out--The recording of information relative to individual or department borrowing a file

  C. Follow-up--Checking on borrowed records to guarantee their return to the files

  D. OUT guides--Pressboard guide with word "OUT" printed on tab

  E. OUT folders--Out folders used when entire file is requested

  F. Carrier folder--Requested material sent to borrower which has words "Return to Files" printed on the tab
  NOTE: Out card is placed in regular folder containing the charge-out information. Regular folder remains in place.

  G. ON-CALL card--A "wanted" card for material that has already been borrowed

  H. Requisitions form--A form used to request records from the files

  I. Confidential papers--Papers considered vital, personal, or confidential which are strictly protected

  J. Tickler file--A follow-up file which is arranged chronologically by month and day

II. Purposes of a charge-out and follow-up system

  A. Provides record control and accounting system

    1. Indicates which records are missing from the file (name or subject of file)

    2. Identifies person or department borrowing the record

   3. Gives date record was borrowed
   4. States date record is to be returned to file.

B. Ensures protection for records

   1. "Vital," "Secret," and "Confidential" records require release signature of a designated officer within a company before they can leave the file.

C. Ensures return of all records to the main file

   1. Tickler files checked daily to guarantee attention to absent files

III. Methods of requesting records from files

A. In person

B. By messenger

C. By telephone

D. By written request

IV. Use of requisitions

A. To ensure record control

B. To secure information concerning:

   1. The record desired
   2. The name of the person desiring the record
   3. The date appearing on the record
   4. The date record is desired
   5. The date record will be returned to the file

C. To attach carbon copies to OUT guides or folders

D. To place carbon copies in tickler file for follow-up purposes

V. Types of requisition forms used in recording requests

A. Cards

B. Slips

C. Guides

D. Folders

INFORMATION SHEET - SECTION 2

VI. Use of OUT forms

- A. To designate that materials have been removed from the files and to identify the borrower, etc.

VII. Types of OUT forms

- A. OUT card
    1. Can be used numerous times
    2. Usually 1/2 to 1/3 width of guide
    3. Filed to extreme right of folder
    4. Made of brightly colored pressboard
- B. Substitution card
    1. Contains slots for requisition card
    2. Card inserted in file in place of borrowed material
    3. Made of brightly colored lightweight cardboard
- C. OUT sheet
    1. Serves same purpose as requisition card
    2. One-half to one-third width of guide
    3. Has OUT printed on tab
    4. Made of brightly colored paper

VIII. Use of OUT guides

- A. To replace folder that has been removed from the file

IX. Types of OUT guides

- A. Guide made of brightly colored pressboard or plastic which has lines for writing requisition information
- B. Guide made of brightly colored pressboard or plastic which has slots for inserting original requisition card

X. Use of OUT folders

   A. Serves as a temporary file folder to hold any incoming records until borrowed folder is returned to the files

XI. Types of OUT folders

   A. Folders made of manila or translucent plastic which have a pocket inside to hold requisition slip or card

   B. Folders made of manila or clear plastic which have lines printed on them for handwritten requisition information

   C. Carrier folders made of manila or brightly colored plastic with the words"Return to Files" printed on the tab. These folders hold the entire contents of a file and serve as a reminder to the borrower to return file as soon as possible.

XII. Use of ON-CALL (wanted) card

   A. These cards, made in duplicate, serve as a notification that borrowed records are needed by someone else. One card goes into the out folder and one card goes to the person who is borrowing the file notifying them someone else needs the file.

INFORMATION SHEET - SECTION 3

XIII. Handling Confidential Papers

A. Papers marked "Vital", "Secret", "Personal", or "Confidential" usually require the signature of a designated officer before they can be viewed or released from the files. These papers, if borrowed, must be returned to the files each night. The file operator is responsible for the security of these papers.

XIV. Use of Tickler Files

A. Serves as a method of reminding the files operator to check daily on borrowed records or files and serves as a means of controlling files

XV. Arrangement of Tickler Files

A. Chronological order

1. Twelve guides or folders, bearing the names of the months of the year printed on the tabs

2. Thirty-one guides or folders with tabs printed 1-31, representing the days of the month

XVI. Types of Tickler Files

A. Special follow-up folders--Folders designed to attract attention to a series of dates in the future. These folders have movable signals which pinpoint the month and the day(s) designated for follow-up action.

B. Card tickler file--Index cards or carbon copies of requisition cards are filed behind date when material is to be returned to the file.

C. Folder tickler file--Duplicates of OUT sheets and substitution cards are filed in tickler folders according to the date the material must be returned to the file.

XVII. Steps involved in charging-out and following-up

A. Request records.

B. Fill out requisition form.

C. Locate and remove record from the files.

D. Replace the record with an OUT form.

E. Place duplicate copy of requisition in file folder.

F. Place duplicate copy of requisition in tickler file.

G. Check tickler file daily for return of files.

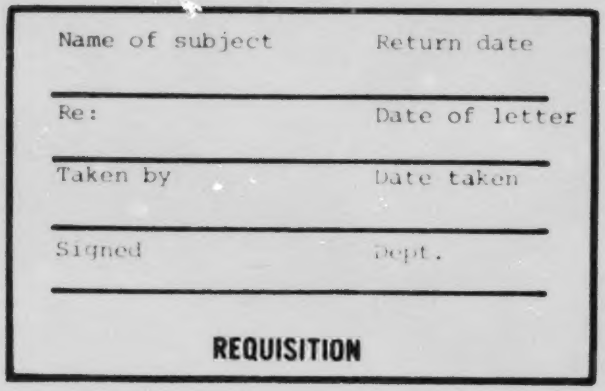
H. Follow-up on ON-CALL cards.

I. Remove all OUT cards from the files and tickler files when records are returned.

J. Cross-out all information recorded on OUT cards indicating that the OUT card is ready to use for another request.

K. Store cards, folders, etc. for reuse.

REQUISITION AND OUT CARDS



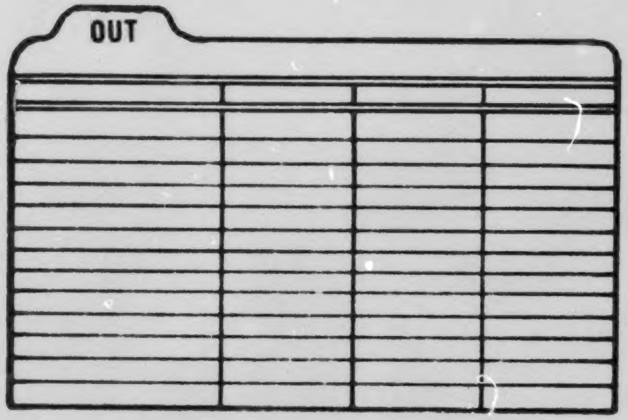
Name of subject Return date

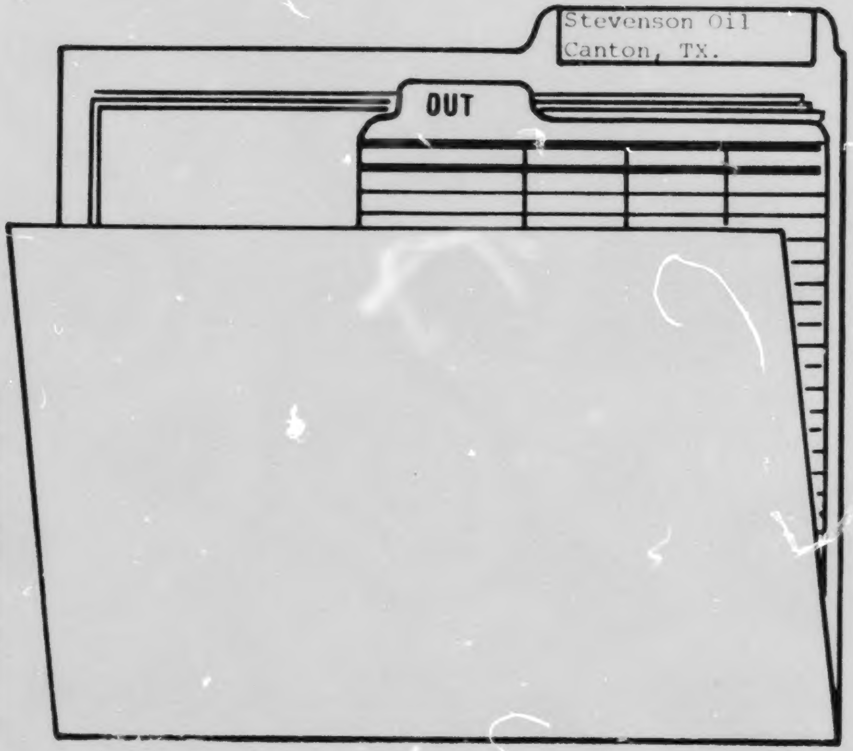
Re: Date of letter

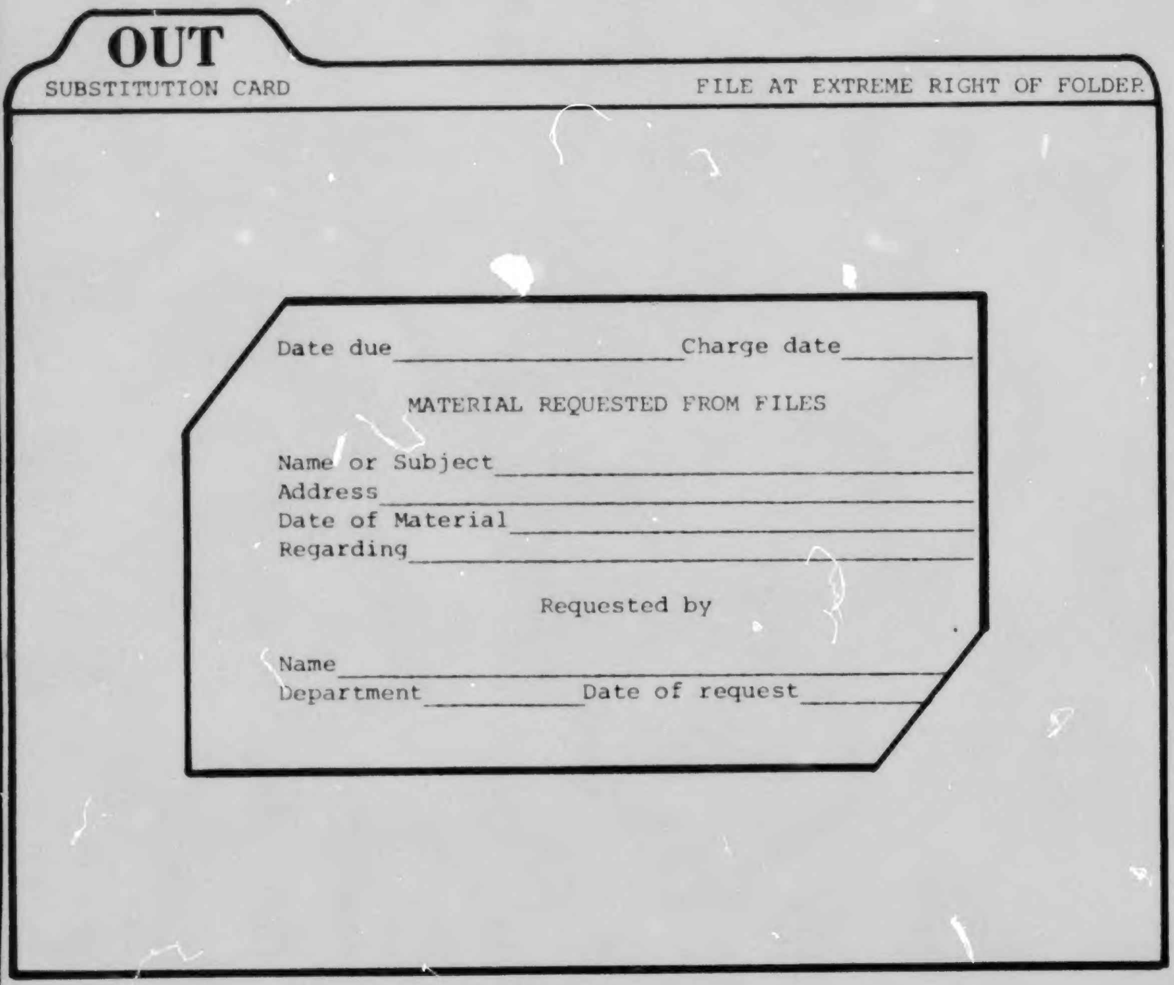
Taken by Date taken

Signed Dept.

REQUISITION







OUT

SUBSTITUTION CARD

FILE AT EXTREME RIGHT OF FOLDER

Date due ________________ Charge date ________

MATERIAL REQUESTED FROM FILES

Name or Subject ____________________

Address ____________________

Date of Material ____________________

Regarding ____________________

Requested by

Name ____________________

Department __________ Date of request ________

SLOTTED OUT CARD

VI-219

OUT SHEET

OUT

TO
File Dept.

Request for papers wanted.
Hold in file until papers are returned.

Request
Date ______________ 19 ______

PAPERS WANTED

Name ______________________________

Address ______________________________

Check Paper Wanted	✓	Date	Description
Letter			
Order			
Invoice			
Credit			
Pur. Order			
Del Rect			

NOTICE

Charge to/WANTED BY
Name ______________________________

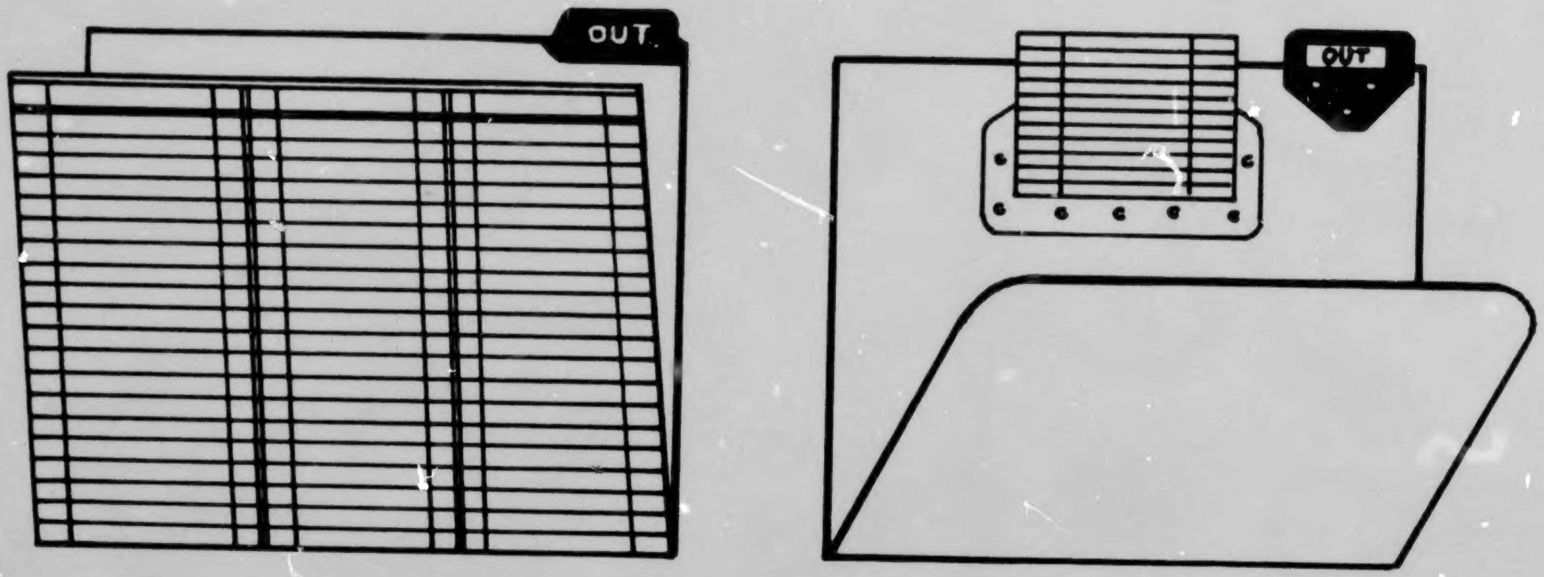
Dept. ______________________________

OUT GUIDE

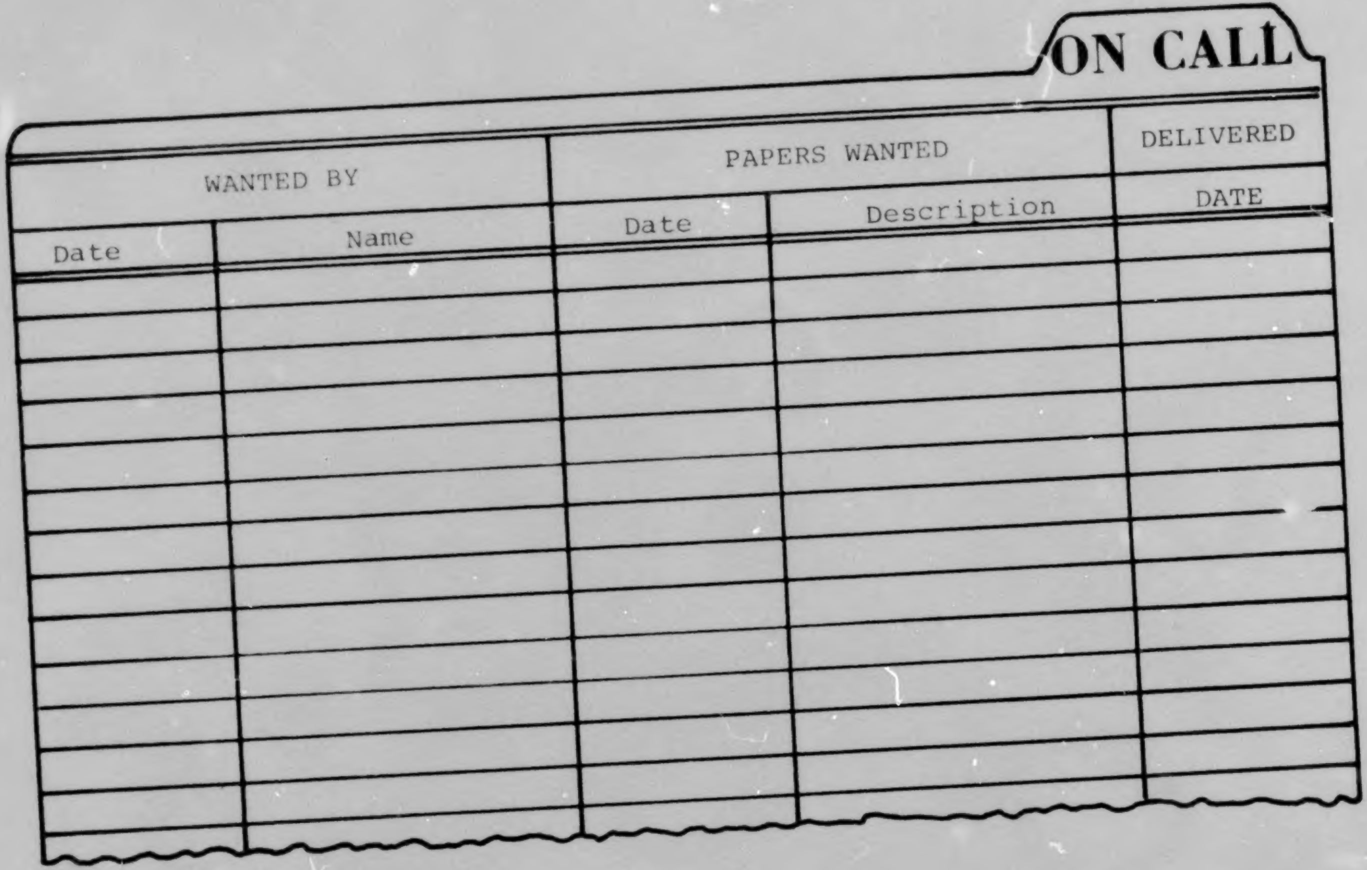
OUT

Taken By	Number Name Subject	Date	Taken By	Number Name Subject	Date	Taken By	Number Name Subject	Date

OUT FOLDERS



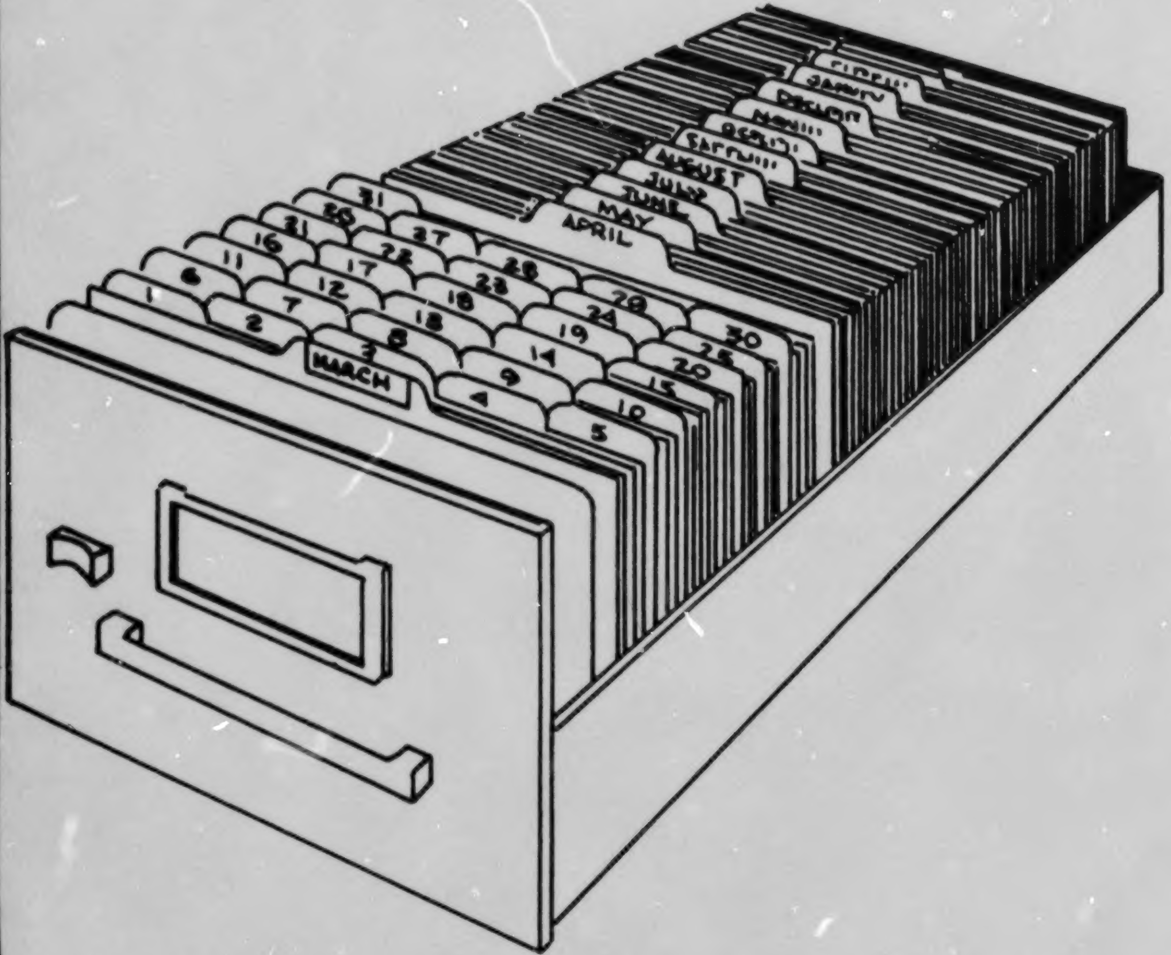
ON CALL



ON CALL

WANTED BY		PAPERS WANTED		DELIVERED
Date	Name	Date	Description	DATE

TICKLER FILE



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UNIT VI

UTILIZING CHARGE-OUT AND FOLLOW-UP SYSTEMS IN FILING

ASSIGNMENT SHEET #1--QUESTIONS ABOUT CHARGING-OUT AND FOLLOWING-UP

1. Distinguish between an OUT folder and OUT guide.

2. Why is it necessary to have multiple copies of the requisition form?

3. What use does a carrier folder have in this kind of system?

4. If you wanted to borrow a record that was already missing from the file, what would you do?

5. If you were a file operator, what procedures would you use to protect "Secret" records?

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UNIT VI

UTILIZING CHARGE-OUT AND FOLLOW-UP SYSTEMS IN FILING

ANSWERS TO ASSIGNMENT SHEET #1

1. An OUT folder serves as a temporary file folder to hold any incoming records until borrowed folder is returned to the files, while an OUT guide indicates that a file folder has been removed from the file.

2. Copies of the requisition forms can be posted in several places:

   a. in file folder

   b. attached to OUT guides and folders

   c. placed in tickler file

3. A carrier folder is used when the entire contents of a file are borrowed and they remind the borrower to return the file as soon as possible.

4. a. Request record.

   b. Fill in a requisition form.

   c. Ask file operator to route ON-CALL card.

   d. Wait for file to be returned or check with person who has file to find out when it will be returned.

5. a. Require the signature of a designated company official before releasing record.

   b. Place copy of requisition of record form in file folder.

   c. Place copy of requisition of record form in tickler file.

   d. Follow-up on tickler file to make sure record was returned.

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UNIT VI

UTILIZING CHARGE-OUT AND FOLLOW-UP SYSTEMS IN FILING

TEST - SECTION 1

1. a. _____ Charge system
   b. _____ Charge-out
   c. _____ Follow-up
   d. _____ OUT guides
   e. _____ OUT folders
   f. _____ Carrier folder
   g. _____ ON-CALL card
   h. _____ Requisition form
   i. _____ Confidential papers
   j. _____ Tickler file

1. A follow-up file which is arranged chronologically by month and day
2. A "wanted" card for material that is already borrowed
3. The recording of information relative to individual or department borrowing a file
4. A form used to request records from the files
5. Requested material sent to borrower in this which has words "Return to files" printed on the tab
6. A method of accounting for records that have been taken from the files
7. Checking on borrowed materials to guarantee their return to the file
8. Used when entire file is requested
9. Papers considered vital, personal, or confidential to company which are strictly protected
10. Made of pressboard with "OUT" printed on tab

2. Cite the purposes of a charge-out and follow-up system.

3. List four methods of requesting records from files.

   a.

   b.

   c.

   d.

4. Describe the kind of information that is needed on a file requisition and state the use of requisitions.

   a.

   b.

   c.

   d.

   e.

5. List four types of requisition forms used in recording requests.

   a.

   b.

   c.

   d.

TEST - SECTION 2

6. State the use of OUT forms.

7. Cite the descriptive terms of the three types of OUT forms.

   a. OUT card

      (1)

      (2)

      (3)

      (4)

   b. Substitution card

      (1)

      (2)

      (3)

   c. OUT sheet

      (1)

      (2)

      (3)

      (4)

8. State the use of OUT guides.

9. Describe two types of OUT guides.

   a.

b.

10. State the use of OUT folders.

11. Describe the three types of OUT folders most frequently used.

a.

b.

c.

12. State the purpose and use of an ON-CALL (wanted) card.

TEST - SECTION 3

13. Cite the manner in which confidential papers are protected and secured.

14. Explain how tickler files are used.

15. Describe the arrangement of tickler files.

16. Match tickler file terms with correct definitions.

_____ a. Card tickler file

_____ b. Folder tickler file

_____ c. Special follow-up folder

1. Folders designed to attract attention to a series of dates in the future. These folders have movable signals which pinpoint the month and the days designated for follow-up action.

2. Index cards or carbon copies of requisition cards are filed behind date when material is to be returned to file.

3. Duplicates of OUT sheets and substitution cards are filed in tickler folder according to the date the material must be returned to file.

17. List in sequence the steps involved in a charge-out and follow-up system.

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UNIT VI

UTILIZING CHARGE-OUT AND FOLLOW-UP SYSTEMS IN FILING

ANSWERS TO TEST - SECTION 1

1. a. 6
   - b. 3
   - c. 7
   - d. 10
   - e. 8
   - f. 5
   - g. 2
   - h. 4
   - i. 9
   - j. 1
2. a. Provides record control and accounting system
   - b. Ensures protection for records
   - c. Ensures return of all records to the main file
3. a. In person
   - b. By messenger
   - c. By telephone
   - d. By written request
4. a. The record desired
   - b. The name of the person desiring the record
   - c. The date appearing on the record
   - d. The date record is desired

e. The date the record will be returned to file

Requisitions are used to secure information and to ensure record control.

5. card slip guide folder

SECTION 2

6. To designate that materials have been removed from the files and to identify the borrower

7. a. OUT card

    (1) Can be used numerous times

    (2) Usually 1/2 to 1/3 width of guide

    (3) Filed to extreme right of folder

    (4) Made of brightly colored pressboard

   b. Substitution card

    (1) Contains slots for requisition card

    (2) Card inserted in file in place of borrowed material

    (3) Made of brightly colored lightweight cardboard

   c. OUT sheet

    (1) Serves same purpose as requisition card

    (2) One-half to one-third width of guide

    (3) Has OUT printed on tab

    (4) Made of brightly colored paper

8. To replace folder that has been removed from the file.

9. a. Guide made of brightly colored pressboard or plastic which has lines for writing information

   b. Guide made of brightly colored pressboard or plastic which has slots for inserting original requisition card

10. OUT folders serve as a temporary file folder until borrowed folder is returned to the files.

11. a. Folders made of manila or translucent plastic which have a pocket inside to hold requisition slip or card

    b. Folders made of manila or clear plastic which have lines printed on them for handwritten requisition information.

    c. Carrier folders made of manila or brightly colored plastic with the words "Return to Files" printed on the tab. These folders hold the entire contents of a file and serve as a reminder to the borrower to return file as soon as possible.

12. ON-CALL cards, which are made in duplicate, serve as a notification that borrowed records are needed by someone else. One card goes into the OUT folder and one card goes to the person who is currently borrowing the file notifying them someone else needs the file.

SECTION 3

13. Papers marked "Vital", "Secret", "Personal", or "Confidential" usually require the signature of a designated officer before they can be viewed or released from the file. These papers, if borrowed, must be returned to the files each night. The file operator is responsible for the security of these papers.

14. Tickler files serve as a method of reminding the files operator to check daily on borrowed files or records and serve as a means of controlling files.

15. Tickler files are arranged in chronological order with twelve guides or folders bearing the names of the months of the year printed on the tabs and thirty-one guides or folders with tabs printed 1-31 representing the days of the month.

16. 2 a.

    3 b.

    1 c.

17. a. Request the record.

    b. Fill out requisition form.

    c. Locate and remove record from the file.

    d. Replace record with OUT form.

e. Place duplicate requisition form in folder.

f. Place duplicate record in tickler file.

g. Check tickler file daily for return of files.

h. Follow-up on On-Call cards.

i. Remove all OUT cards from files and tickler files when records are returned.

j. Cross-out all information recorded on OUT cards indicating that the OUT card is ready to use for another request.

k. Store cards, folders, etc. for reuse.

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UNIT VII

FILING MATERIAL BY SUBJECT

TERMINAL OBJECTIVE

After completing this unit, the student will be able to match terms on subject filing with their definitions; discuss the purposes of subject files; explain combination subject files, alphabetic subject files, numeric subject files; and differentiate between advantages and disadvantages of subject filing. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student will be able to:

1. Match terms on subject filing with their correct definition.
2. List the requirements of a good index.
3. Discuss the purposes of subject files.
4. List the types of subject files and their divisions.
5. Explain and draw a combination subject file.
6. Explain and draw an alphabetic subject file.
7. Explain and draw a numeric subject file.
8. Discuss the supplies needed in subject filing.
9. Identify true statements about the subject filing procedure.
10. Differentiate between the advantages and disadvantages in subject filing.
11. Demonstrate the ability to:
    a. Determine divisions and subdivisions of subject files.
    b. Evaluate and group subjects.

c. Evaluate an index of yellow classified pages in a telephone book.

d. Choose subject filing supplies.

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UNIT VII

FILING MATERIAL BY SUBJECT

SUGGESTED ACTIVITIES

I. Instructor:

   A. Provide objective sheet.
   B. Discuss objective sheet.
   C. Provide information sheet.
   D. Discuss information sheet.
   E. Show transparencies.
   F. Explain how to file by subject.
   G. Provide assignment sheets.
   H. Discuss assignment sheets.
   I. Give test and evaluate results.

II. Student:

   A. Read objective sheet.
   B. Participate in discussion of objective sheet.
   C. Read information sheet.
   D. Participate in discussion of information sheet.
   E. View transparencies.
   F. Participate in explanation of filing by subject.
   G. Read assignment sheets.
   H. Complete assignment sheets.
   I. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

A. Objectives

B. Information sheet

C. Transparency masters

1. VII-TM-1--Examples of Subject Files
2. VII-TM-2--Combination Subject File
3. VII-TM-3--Alphabetic Subject File - Straight Dictionary Arrangement
4. VII-TM-4--Alphabetic Subject File - Encyclopedia Arrangement
5. VII-TM-5--Numeric Subject File - Simple Numeric Arrangement
6. VII-TM-6--Numeric Subject File - Decimal Numeric Arrangement
7. VII-TM-7--Numeric Subject File - Duplex Numeric Arrangement

D. Assignment sheets

1. Assignment Sheet #1--Determining Divisions and Subdivisions of Subject Files
2. Assignment Sheet #2--Evaluating and Grouping Subjects
3. Assignment Sheet #3--Discussing High Cost of Subject Filing
4. Assignment Sheet #4--Evaluating an Index of Yellow Classified Pages of a Telephone Book
5. Assignment Sheet #5--Choosing Subject Filing Supplies

E. Answers to assignment sheets

F. Test

G. Answers to test

II. References:

A. Books

1. Bassett, Ernest D. and David G. Goodman. *Business Filing and Records Control*. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

2. Gregg, John Robert and others. *Applied Secretarial Practice*. 7th ed. Dallas, Texas: Gregg Division, McGraw-Hill Book Co., 1974.

3. Kahn, Gilbert and others. *Progressive Filing*. 8th ed. New York, New York: McGraw-Hill Book Company, 1969.

4. Meehan, James R. and others. *Clerical Office Procedures*. 5th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

5. Meehan, James R. and others. *Secretarial Office Procedures*. 8th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

6. Sherster, Joyce. *File Clerk*. New York, New York: McGraw-Hill Book Company, 1973.

7. Wood, Merle W. and Margaret A. McKenna. *The Receptionist*. New York, New York: McGraw-Hill Book Company, 1966.

B. Practice Sets

1. Bassett, Ernest D. and David G. Goodman. *Office Filing Procedures*. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

2. Kahn, Gilbert and others. *Gregg Quick Filing Practice*. New York, New York: McGraw-Hill Book Company, 1965.

3. Kahn, Gilbert and others. *Progressive Filing Practice Set*. New York, New York: McGraw-Hill Book Company, 1969.

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UNIT VII

FILING MATERIAL BY SUBJECT

INFORMATION SHEET

I. Definition of terms

   A. Subject filing--The arrangement of records by means of topics or items rather than by names of people, companies, or locations

   B. Combination subject file--A subject file used when correspondence to be grouped by subject is small compared with records to be filed under the name of persons or organizations. It contains subject captions as well as regular name captions.

   C. Alphabetic subject file--A subject file which has subject headings and alphabetized divisions

   D. Relative index--An alphabetic list of all the headings, divisions, and subdivisions in the file

   E. Numeric subject file--A subject file which uses numbers for captions in place of words

   F. Simple-numeric--Subject system organized first by assigning numbers to the main subject headings in the file

   G. Decimal-numeric--Subject system used when main headings are subdivided more than twice

   H. Duplex-numeric--Subject system used when there are ten main headings or more than nine divisions or subdivisions under the same heading

II. Requirements of a good index

   A. Standardized within a department if not throughout the company

   B. Flexible for growth

   C. Understandable to all who use it

III. Purposes of subject files

   A. To organize records that do not refer to the name of a person or organization

Example: Chemical formula filed under name of drug

B. To organize correspondence that is more likely to be called for by its subject than by the name of the correspondent

Example: Insurance policy number under office furniture insurance policy

C. To group records concerning activities or products of an organization so that all records about one activity can be obtained immediately from the files

Example: File on desks to refer to when buying a new desk

D. To group together records that would otherwise fall into minute subdivisions

Example: Many suppliers - organize on a product basis

IV. Types of subject files

A. Combination subject file

B. Alphabetic subject file

1. Straight dictionary arrangement

2. Encyclopedia arrangement

C. Numeric subject file

1. Simple numeric arrangement

2. Decimal numeric arrangement

3. Duplex numeric arrangement

V. Combination subject file

A. Used when correspondence to be grouped by subject is small compared with records to be filed under the name of persons or organizations

B. Contains subject captions as well as regular name captions

VI. Alphabetic subject file

A. Straight dictionary arrangement of an alphabetic subject file

1. Subject names are written on folders with wide labels and folders are filed behind alphabetic guides.

2. Every subject has own folder.

3. Very active folders should be made obvious by special subject guides similar to name guides.

B. Encyclopedia arrangement of an alphabetic subject file

1. Intended for executive use

2. Guides

   a. Primary subjects - first position, 1/5 cut

   b. Sub-classifications - second position, 1/5 cut

3. Folders

   a. Individual or company name folders are added as sufficient papers justify third position, 1/3 cut folders.

   b. Tabs are labeled with subject or classification first and next with the name of the individual or company.

   c. Very active subjects should be made obvious by special subject guides.

VII. Numeric

A. Simple numeric arrangement

1. Each subject is assigned a number from an accession book in the order in which the subject is added to the file.

2. A card file or relative index is maintained and is consulted each time a paper is filed or called for.

3. Every similar subject title by which every subject might be called for must be included in the relative index.

4. File folders are arranged numerically.

B. Decimal numeric arrangement

1. Headings are subdivided more than twice.

2. By adding numbers to the right of the decimal point, one can subdivide indefinitely.

C. Duplex numeric arrangement

1. Use when there are more than ten main headings or more than nine divisions or subdivisions under the same heading.

2. Provides a number for each of the subdivisions.

VIII. Supplies for subject filing

A. Guides

1. Alphabetic set

2. Blank set

3. OUT guides

B. Folders

1. Double width tab folders

2. Metal tab folders

3. Labels for folders

C. Subject indexes

1. Valuable when choosing new headings

2. Valuable in finding correct headings

3. Relative index - complex arrangement in which all main headings, division headings, and variations are listed

Example: Pages preceding the yellow classified section of many telephone directories

IX. Filing procedure

A. Inspect

B. Index

1. Read contents to determine subject or subjects.

2. If more than one subject, determine most important subject.

C. Code

1. Main subject heading

2. All subdivisions

3. If the subject is not mentioned, it should be written at the top of the sheet.

4. All subjects except the main one are cross-referenced.

D. Cross-reference

1. Number unlimited

2. Copies may be used.

3. Permanent cross-references have guides with tabs bearing a label directing the searcher to the correct place in the files where the papers may be found.

4. See references - cross-references for similar or synonymous terms

E. Sort

1. By main headings, A to Z or numerically

2. Subdivisions are made at the time records are inserted into file folders.

F. File

1. Miscellaneous subject folder - alphabetic order of subjects

2. Single subject folder - alphabetic order of the correspondents (If two identical subjects, file chronologically with most recent date in front)

G. Charge-out and follow-up - [illegible] indicator shows subject first and then the other information.

X. Advantages and disadvantages of the subject method

A. Advantages

1. Saves time

2. Can be expanded easily

3. Statistical information can be obtained and relationships perceived.

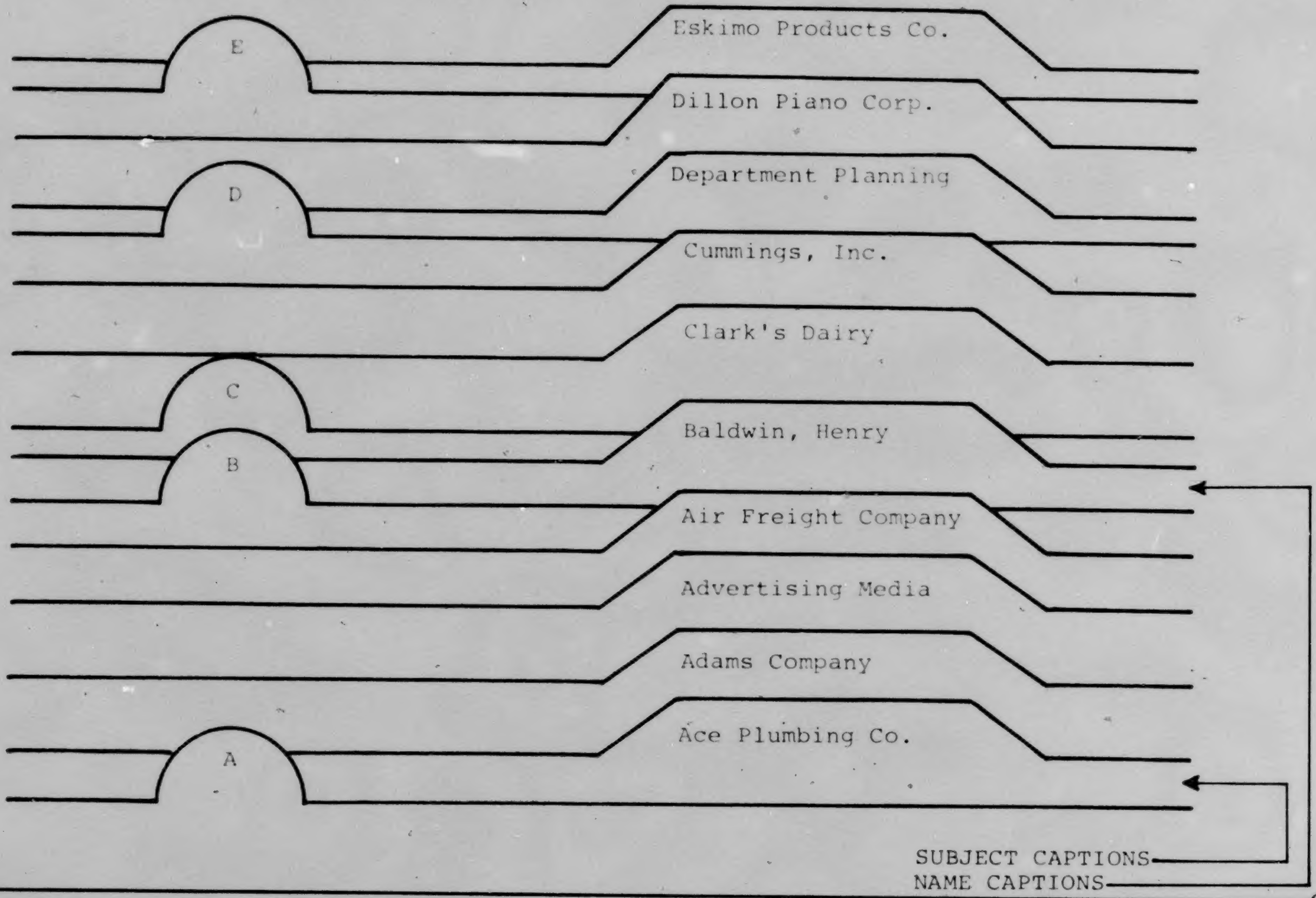
B. Disadvantages

1. Lists and divisions may grow until there are too many subjects chosen.
2. Selection of subject classification is difficult.
3. Development and installation requires assistance of experienced records analysts, and staff must be thoroughly trained.
4. Most expensive
5. Possibility of transposition and misreading
6. Inadequate subject index
7. Subject to individual interpretation
8. Extensive cross-referencing

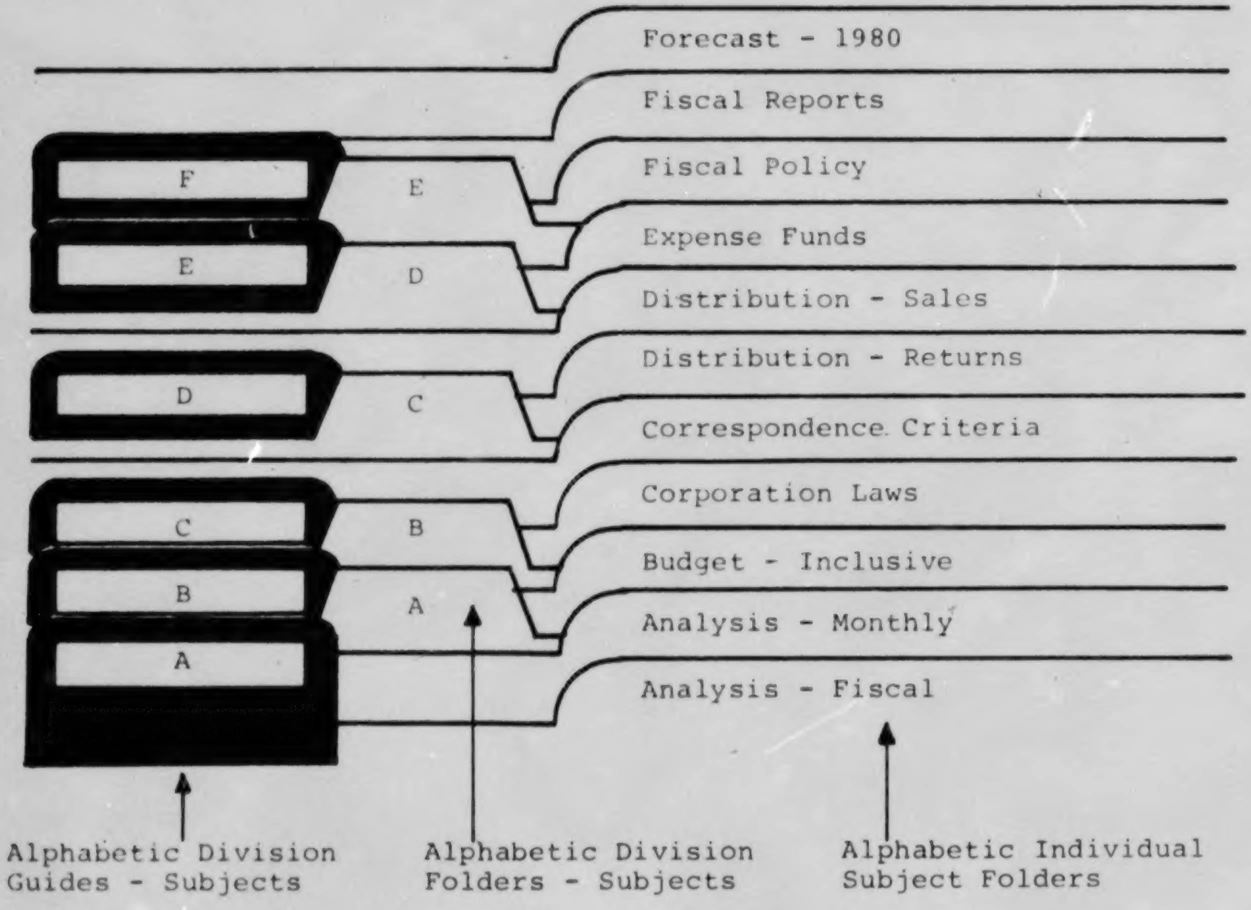
EXAMPLES OF SUBJECT FILES

Main Headings	Subdivisions
Recipes	Barbecue Beverages
Personal Files (of an executive)	Committees Insurance
Sales (Department of a Dairy)	Cheese Ice Cream

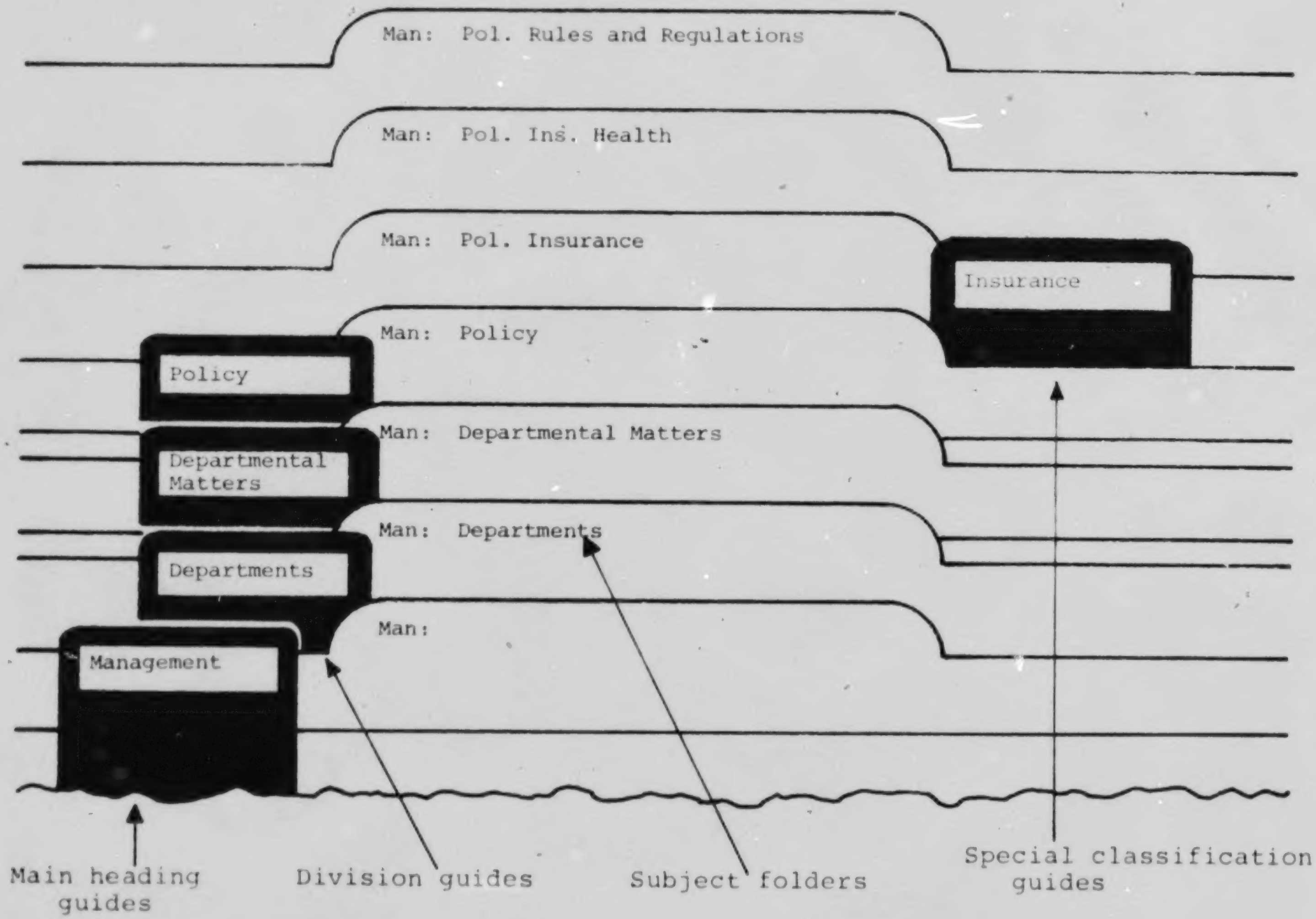
COMBINATION SUBJECT FILE



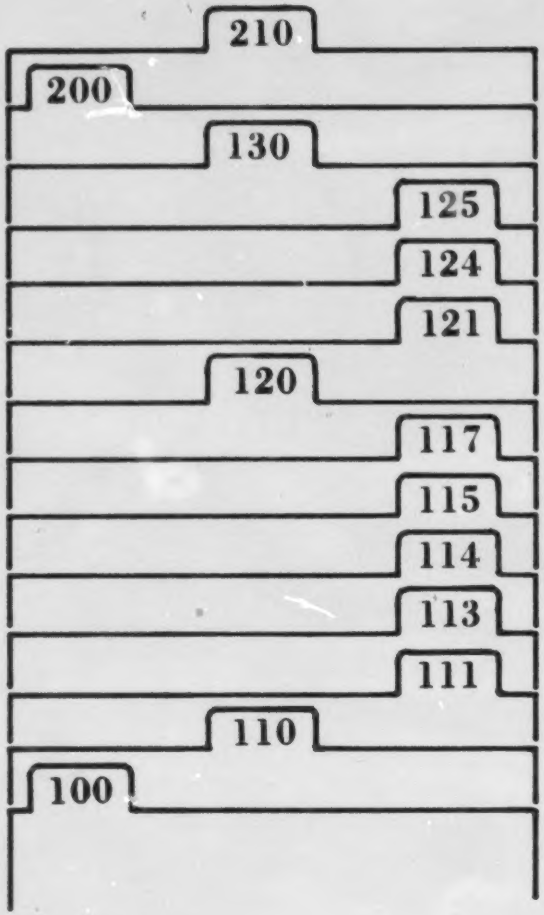
ALPHABETIC SUBJECT - DICTIONARY ARRANGEMENT

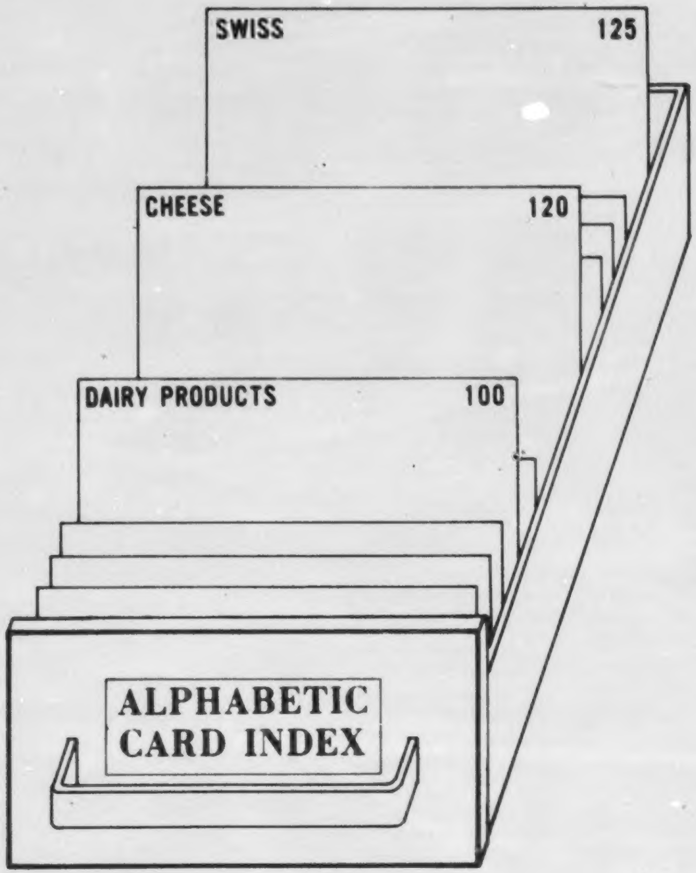


ALPHABETIC SUBJECT FILE - ENCYCLOPEDIA ARRANGEMENT

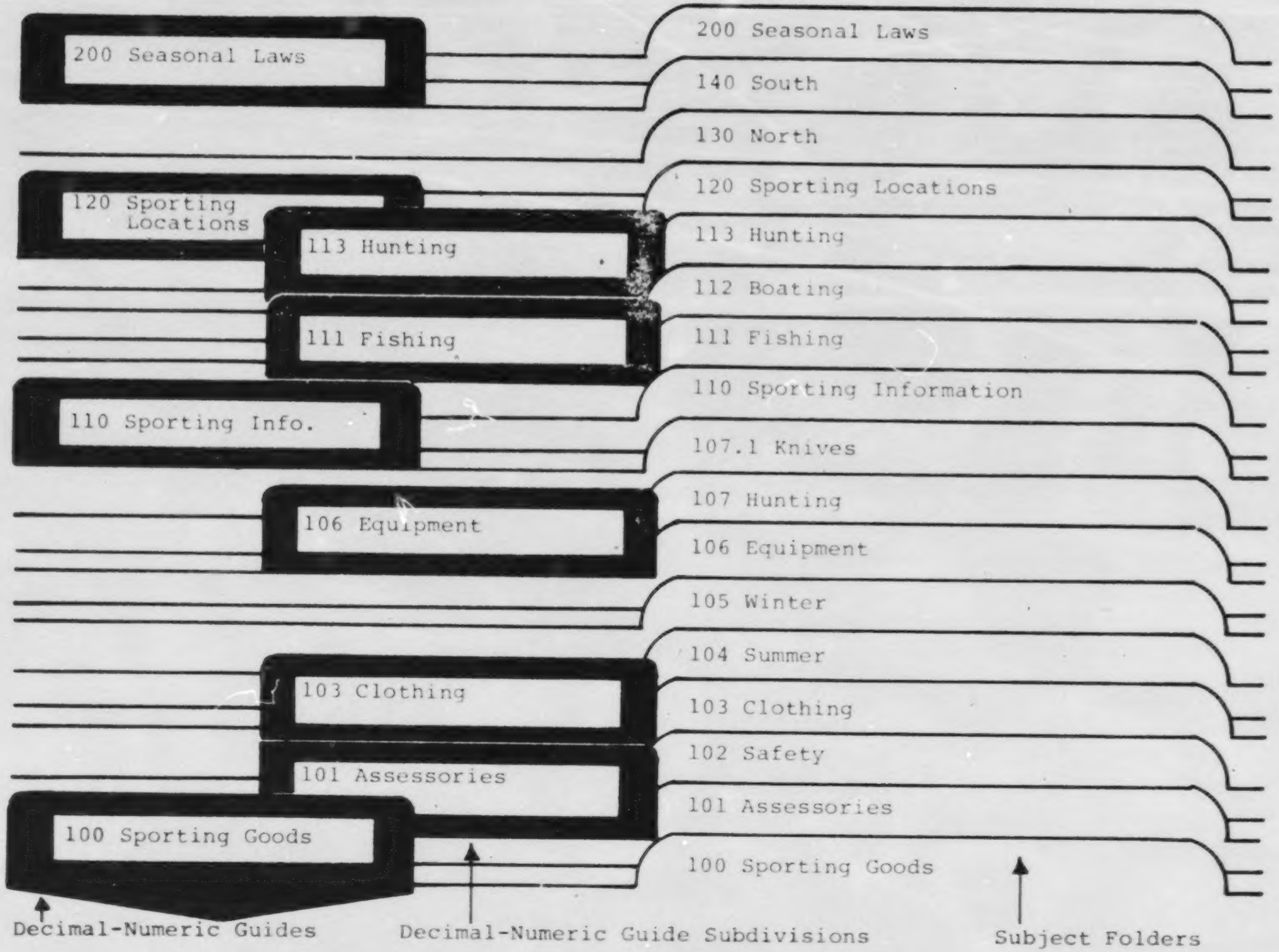


SIMPLE NUMERIC





DECIMAL - NUMERIC ARRANGEMENT



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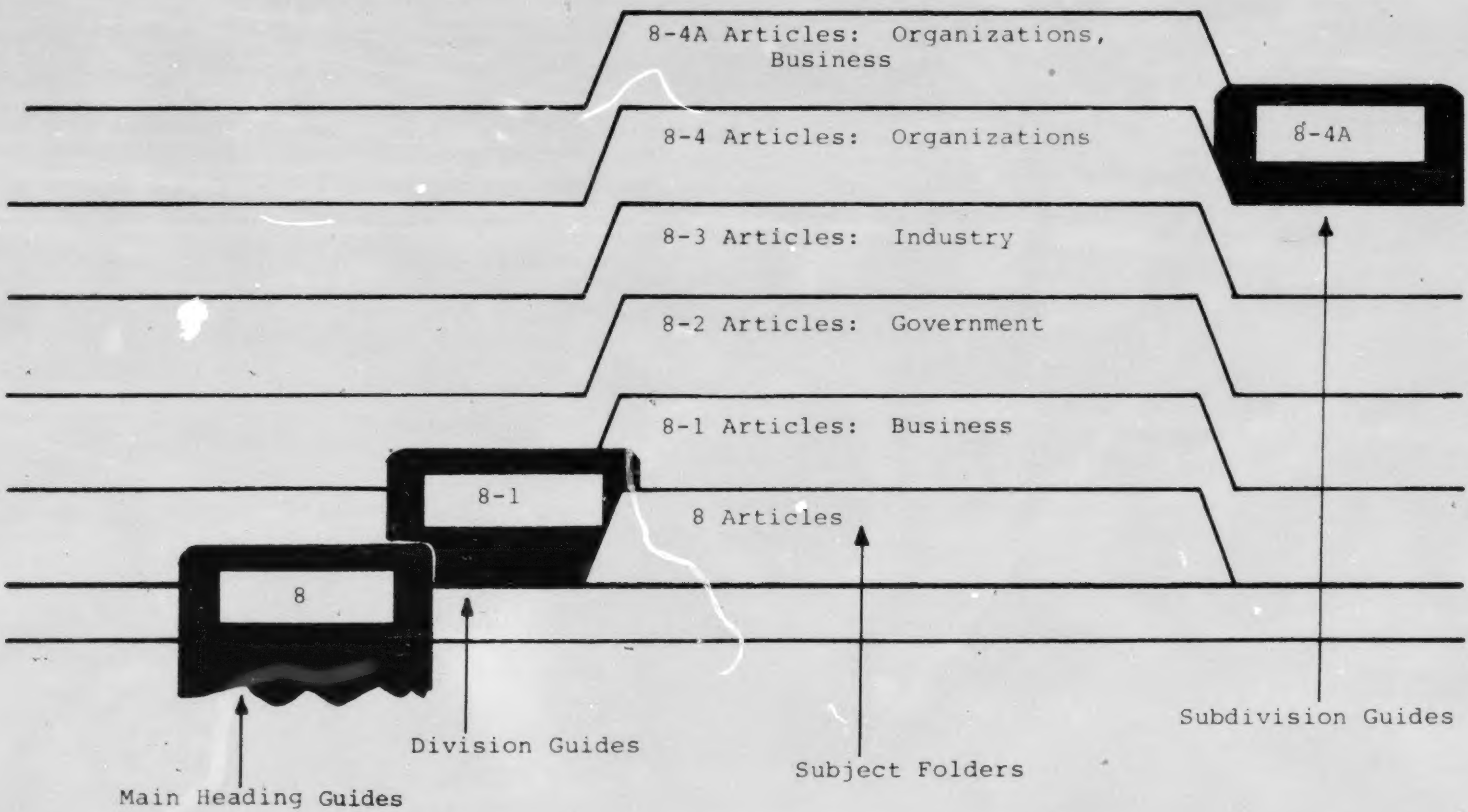
DUPLEX - NUMERIC



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UNIT VII

FILING MATERIAL BY SUBJECT

ASSIGNMENT SHEET #1--DETERMINING DIVISIONS AND SUBDIVISIONS OF SUBJECT FILES

If the following were main headings, what might be some of their divisions and subdivisions?

A. Typing Supplies

B. Office Machines

C. Meats

D. Office personnel

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UNIT VII

FILING MATERIAL BY SUBJECT

ASSIGNMENT SHEET #2--EVALUATING AND GROUPING SUBJECTS

Directions: Read over the following list of subjects. Group them into main headings and subdivisions. Put an "X" where a cross-reference is needed.

1. Business Education
2. Student Teaching
3. Economics
4. Social Sciences
5. Computer Science
6. Elementary Education
7. Psychology Education
8. Marketing
9. Social Welfare
10. Education
11. Sociology
12. Accounting
13. History
14. Government
15. Guidance and Counseling
16. Business
17. Secondary Education
18. Geography
19. Office Administration
20. Law Enforcement

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UNIT VII

FILING MATERIAL BY SUBJECT

ASSIGNMENT SHEET #3--DISCUSSING HIGH COST OF SUBJECT FILING

Directions: Write a paragraph discussing the factors that make subject filing costly.

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UNIT VII

FILING MATERIAL BY SUBJECT

ASSIGNMENT SHEET #4--EVALUATING AN INDEX OF YELLOW CLASSIFIED PAGES IN A TELEPHONE BOOK

Directions: Secure a large telephone book with yellow classified pages. Look at the index preceding the yellow classified pages. How does this compare to a relative file? How does it differ from the listings in the yellow pages? Write a short paragraph on your findings.

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UNIT VII

FILING MATERIAL BY SUBJECT

ASSIGNMENT SHEET #5--CHOOSING SUBJECT FILING SUPPLIES

Directions: Secure a filing equipment catalog. Look up the guide and folder materials available in the catalog. Determine the kinds you would use for subject filing. Make a list of them for comparison with others made by classmates.

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UNIT VII

FILING MATERIAL BY SUBJECT

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

A. Typing Supplies
  1. Paper
    a. Letterhead
    b. Onionskin
  2. Correcting utensils
    a. Correcting paper
    b. Correcting liquid
    c. Eraser

B. Office Machines
  1. Typewriters
    a. Olivetti
    b. Selectric IBM
      1b. Correcting
      2b. Non-correcting
  2. Adding Machines
    a. Full-key
    b. Ten-key

C. Meats
  1. Beef
    a. Steak
      1a. Sirloin
      2a. T-bone
  2. Ham
    a. Bacon
    b. Sausage

D. Office Personnel
  1. File clerks
  2. Managers
  3. Secretaries
  4. Supervisors

Assignment Sheet #2

1 Education

1a) Business Ed.
1b) Elementary Ed.
1c) Guidance and Counseling
1d) Psychology Ed.
1e) Secondary Ed.
1f) Student Teaching

2 Business

2a) Accounting
1aX) or 2b) Business Ed.
2c) Computer Science
2d) Economics
2e) Marketing
2f) Office Administration

3 Social Sciences

2dX) or 3a) Economics
3b) Geography
3c) Government
3d) History
3e) Law Enforcement
1dX) or 3f) Psychology Ed.
1cX) or 3g) Guidance and Counseling
3h) Social Welfare
3i) Sociology

Assignment Sheet #3

The development and installation of subject files usually requires the assistance of experienced records analysts. All personnel who maintain the files must be thoroughly trained in all phases of subject classification. It also requires very experienced file operators. Preparation of materials always takes more time than the other methods. Each paper must be carefully read. The inappropriate uses of the subject method as with any method can be very time consuming and expensive.

Assignment Sheet #4

A relative file is a type of complex card index in which all main headings, division headings, and variations are listed. This is how the index to the yellow pages is arranged. In the index, it has only subject headings, whereas in the actual listing there are businesses listed in alphabetical order under these subjects.

Assignment Sheet #5

A. Guides
    1. First position sets - alphabetic
    2. Third position sets - blank
    3. OUT guides

B. Folders
    1. Second position sets
    2. Fourth position sets
    3. Fifth position sets
    4. Metal tab folder attachments
    5. Gummed labels

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UNIT VII

FILING MATERIAL BY SUBJECT

UNIT TEST

1. Match the following terms with the correct definitions.

_____ a. Relative index

_____ b. Combination subject file

_____ c. Simple numeric

_____ d. Duplex numeric

_____ e. Decimal numeric

_____ f. Alphabetic subject file

_____ g. Numeric subject file

_____ h. Subject filing

1) Arrangement of records by names of topics, rather than by names of people, companies, or locations

2) Subject system used when there are ten main headings or more than nine divisions or subdivisions under the same heading

3) A subject file used when correspondence to be organized by subject is small compared with records to be filed under the name of persons or organizations. It contains subject captions as well as regular name captions.

4) Subject system used when main headings are subdivided more than twice

5) A subject file which has subject headings and alphabetized divisions

6) Subject system organized first by assigning numbers to the main subject headings in the file

7) An alphabetic list of all headings, divisions, and subdivisions in the file

8) A subject file which uses numbers for captions in place of words

2. List the requirements of a good index.

a.

b.

c.

3. Discuss the purposes of subject files.

4. List the types of subject files and their various arrangements.

5. Explain and draw an example of a combination subject file.

6. Explain and draw an example of an alphabetic subject file.

7. Explain and draw an example of a numeric subject file.

8. Discuss guides, folders, and the card index in relation to subject filing.

9. Circle the correct letter: T if the statement is true or F if the statement is false.

T F a. When indexing business names, read the contents carefully to determine the subject.

T F b. Only the first subject found needs to be indexed for filing.

T F c. Sorting may be done by main headings A to Z or numerically.

T F d. Miscellaneous subject folders are filed in the alphabetic order of their subjects.

T F e. Single subject folders are filed in the alphabetic order of their subjects.

T F f. If the subject is not mentioned, it should be written at the top of the sheet.

T F g. See references always have guides with tabs bearing a label directing the searcher to the correct place in the files.

T F h. All subjects are cross-referenced.

T F i. Inspection involves the same process as other methods of filing.

T F j. The OUT indicator shows the subject after the name of the person or company.

10. Read the following list. Determine which is an advantage and which is a disadvantage of subject filing. Circle A for advantage and D for disadvantage.

A D a. Time

A D b. Selection of subjects

A D c. Expansion

A D d. Possible growth size

A D e. Development and installation

A D f. Cost

A D g. Cross-referencing

A D h. Obtaining statistics

A D i. Percentage of transposition and misfiling

A D j. Individual interpretation

11. Demonstrate the ability to:

a. Determine divisions and subdivisions.

b. Group subjects.

c. Discuss high cost of subject filing.

d. Evaluate an index of yellow classified pages in a telephone book.

e. Choose subject filing supplies.

(NOTE: If the skills have not been accomplished prior to the test, ask the instructor when they should be completed.)

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UNIT VII

FILING MATERIAL BY SUBJECT

ANSWERS TO UNIT TEST

1. 7 a.
   3 b.
   6 c.
   2 d.
   4 e.
   5 f.
   8 g.
   1 h.

2. a. Standardized within a department if not throughout the company

   b. Flexible for growth

   c. Understandable to all who use it

3. a. To organize records that do not refer to the name of a person or organization

   b. To organize correspondence that is more likely to be called for by its subject than by the name of the correspondent

   c. To group records concerning activities or products of an organization so that all records about one activity can be obtained immediately from the files

   d. To group together records that would otherwise fall into minute subdivisions

4. a. Combination subject file

   b. Alphabetic subject file

      1b. Straight dictionary arrangement

      2b. Encyclopedia arrangement

c. Numeric subject file

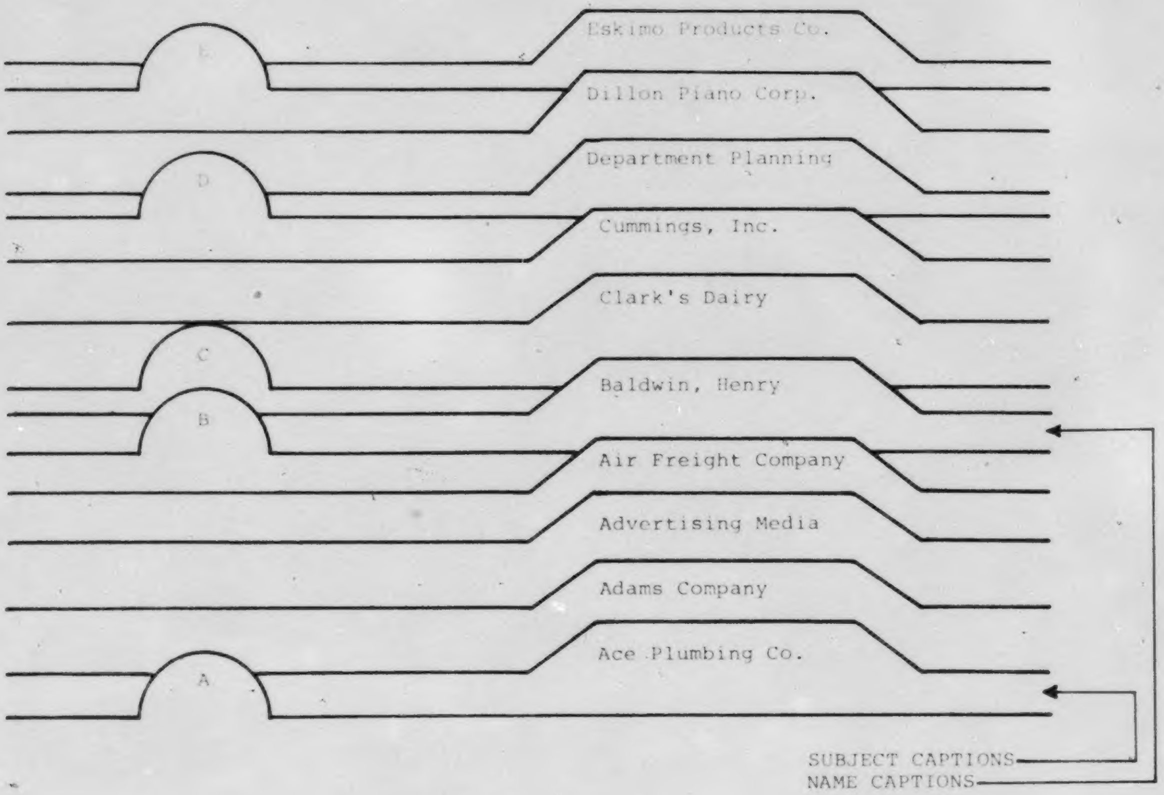
  1c. Simple numeric arrangement

  2c. Decimal numeric arrangement

  3c. Duplex numeric arrangement

5. Combination subject file is used when correspondence to be grouped by subject is small compared with records to be filed under the name of persons or organizations. It contains subject captions as well as regular name captions.

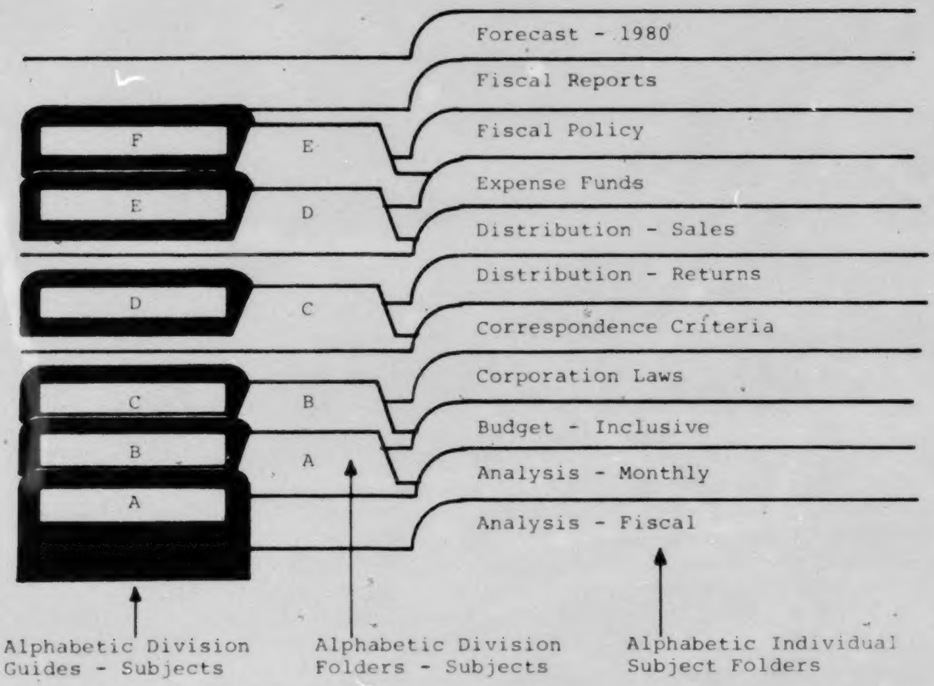
COMBINATION SUBJECT FILE



(NOTE: Either of the following is appropriate.)

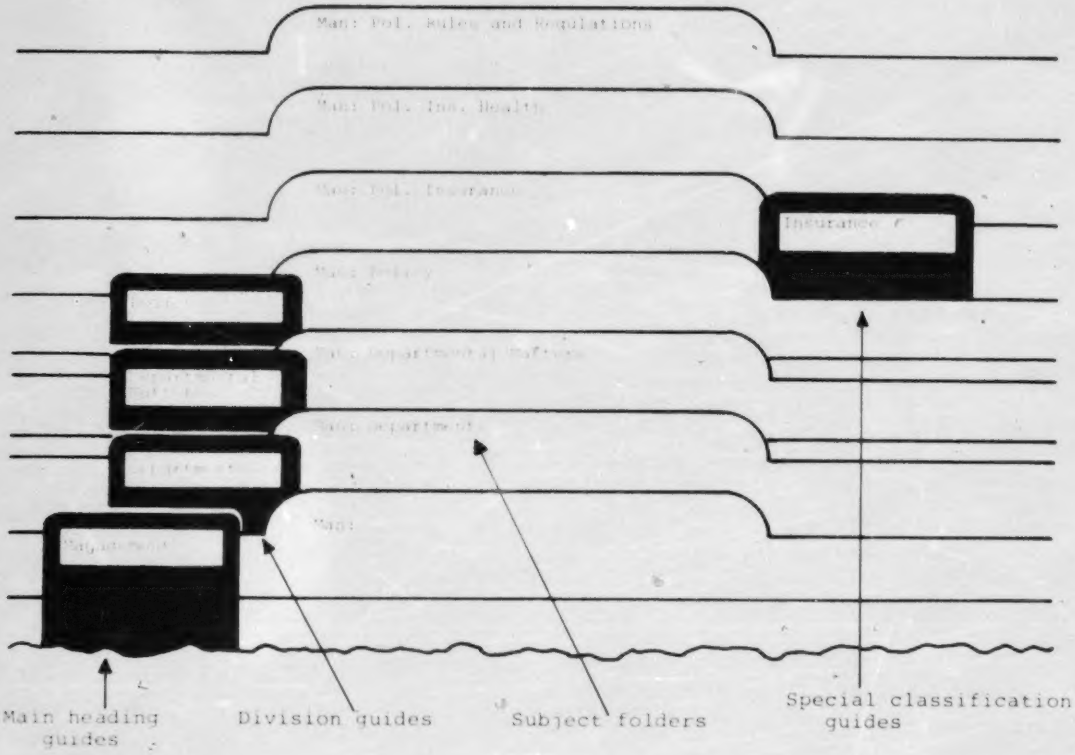
6. In the straight dictionary arrangement, subject names are written on folders with wide labels and are filed behind alphabetic guides. Every subject has its own folder and very active folders should be made obvious by special subject guides similar to name guides.

ALPHABETIC SUBJECT - DICTIONARY ARRANGEMENT



The encyclopedia arrangement is intended for executive use. Guides are in first and second position displaying subjects. Folders are added as sufficient papers justify third position. They display the individual or company name. Tabs are labeled by subject first and then the name. Very active subjects should be made obvious by special subject guides.

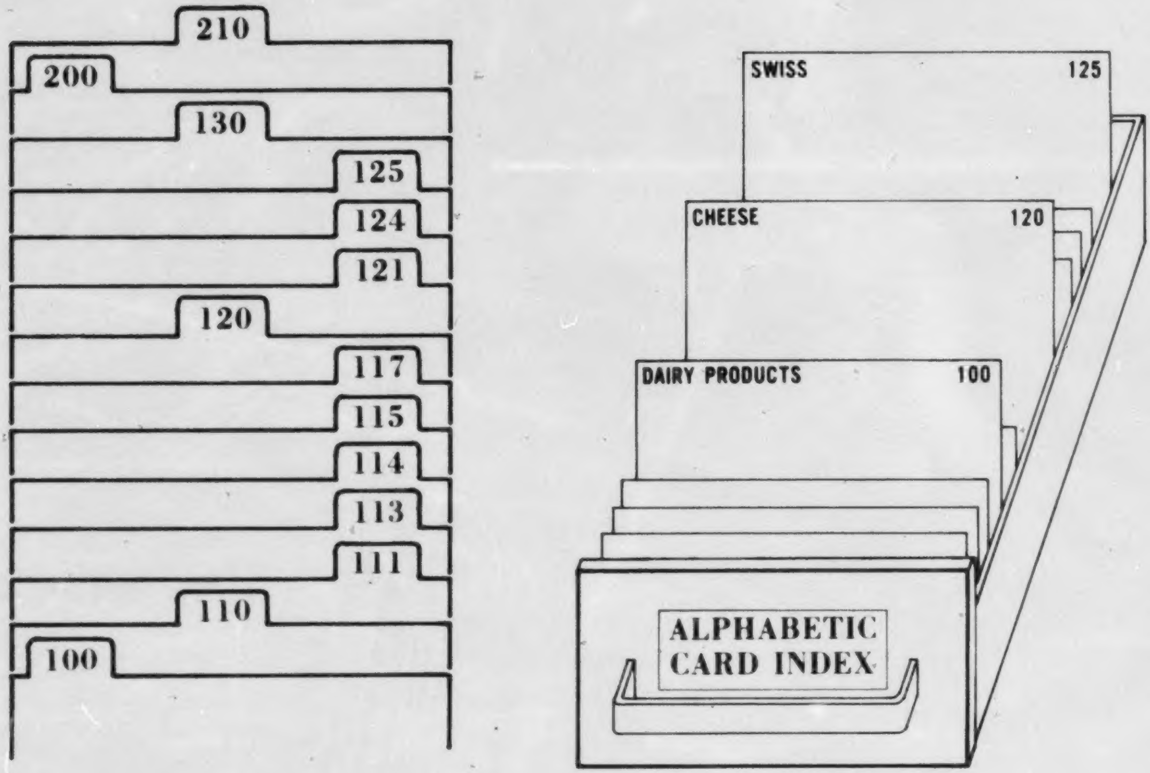
ALPHABETIC SUBJECT FILE - ENCYCLOPEDIA ARRANGEMENT



(NOTE: Any of the following is appropriate.)

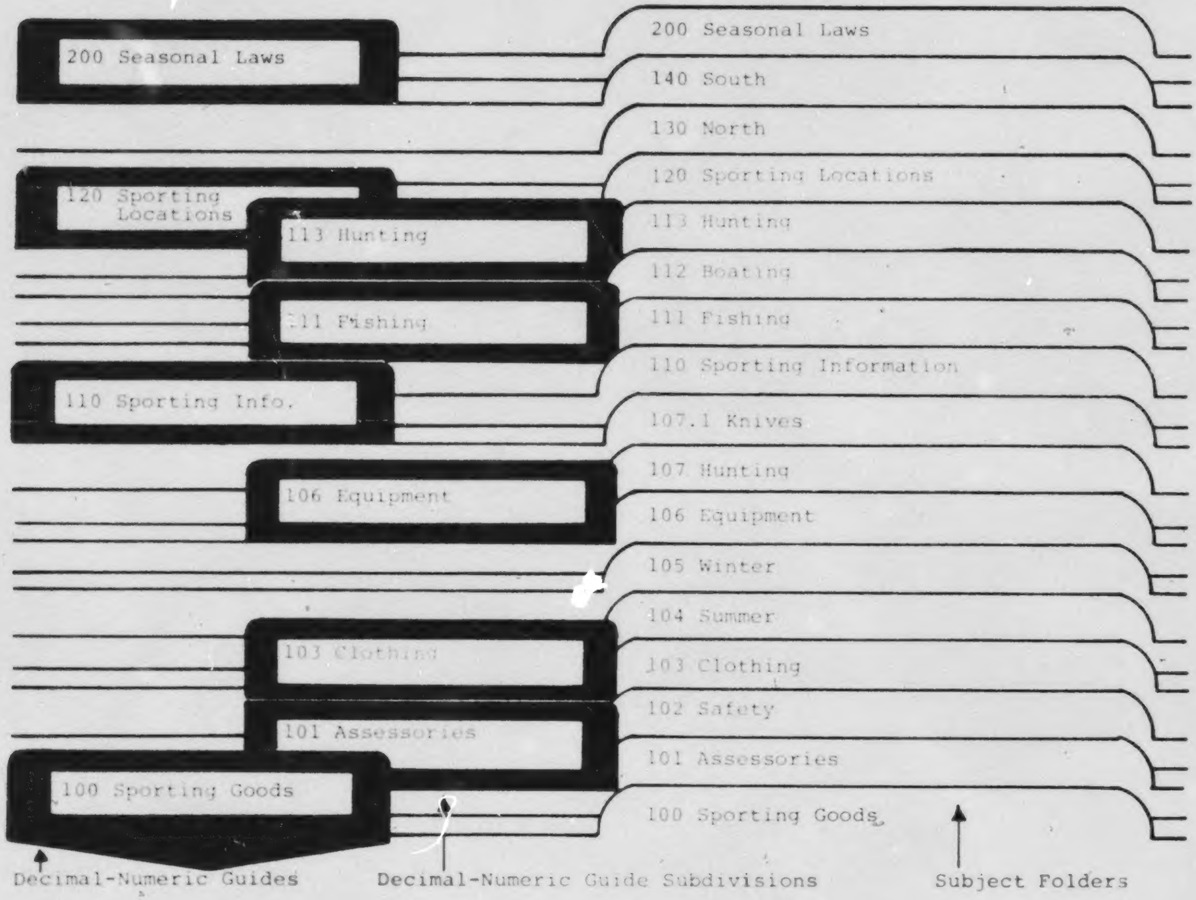
7. In the simple numeric arrangement, each subject is assigned a number from an accession book in the order in which the subject is added to the file. A card or relative index is maintained for consultation each time a paper is filed or called for. Every similar subject title by which every subject might be called for must be included in the relative index. File folders are arranged numerically.

SIMPLE NUMERIC



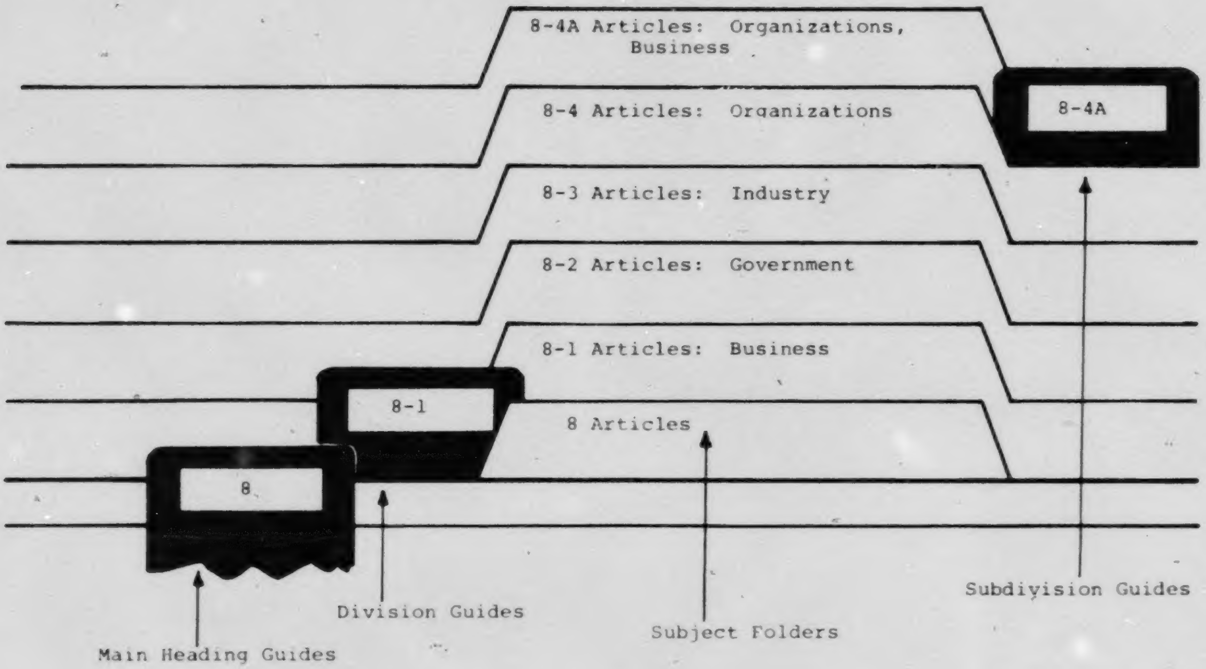
In the decimal numeric arrangement, headings are subdivided more than once. By adding numbers to the right of the decimal point, one can subdivide indefinitely.

DECIMAL - NUMERIC ARRANGEMENT



The duplex numeric arrangement is used when there are more than two main headings or more than nine divisions or subdivisions under the same heading. It provides a number for each of the subdivisions.

DUPLEX - NUMERIC



8. Guides
    a. Alphabetic set
    b. Subject and divisions
    c. OUT

    Folders
    a. Double width with tab folders
    b. Metal tab folders
    c. Avoid miscellaneous folders
    d. Labels for folders

    Card Index
    a. Valuable when choosing new headings
    b. Valuable in finding correct headings
    c. Relative index - complex arrangement in which all main headings, divisions and variations are listed

9. a. T
    b. F
    c. T
    d. T
    e. F
    f. T
    g. F
    h. F
    i. T
    j. F

10. a. A
    b. D
    c. A
    d. D

e. D

f. D

g. D

h. A

i. D

j. D

11. Evaluated to the satisfaction of the instructor.

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UNIT VIII

FILING MATERIALS NUMERICALLY

TERMINAL OBJECTIVE

After completing this unit, the student will be able to match terms associated with filing materials numerically to the correct definition, discuss the advantages and disadvantages of numeric filing, explain the basic features of a numeric file, list the steps in numeric filing, and file correspondence numerically. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student will be able to:

1. Match terms associated with filing materials numerically to the correct definition.
2. Discuss the advantages and disadvantages of numeric filing.
3. Explain the basic features of a numeric file.
4. List in order the steps involved in the numeric filing procedure.
5. Explain the differences in the other numeric filing methods.
6. Demonstrate the ability to:
    a. File correspondence in a consecutive number file.
    b. File correspondence in a terminal digit file.

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UNIT VIII

FILING MATERIALS NUMERICALLY

SUGGESTED ACTIVITIES

I. Instructor:

  A. Provide objective sheet.

  B. Discuss objective sheet.

  C. Provide information sheet.

  D. Discuss information sheet.

  E. Show transparencies.

  F. Provide assignment sheets.

  G. Discuss assignment sheets.

  H. Give test and evaluate results.

II. Student:

  A. Read objective sheet.

  B. Participate in discussion of objective sheet.

  C. Read information sheet.

  D. Participate in discussion of information sheet.

  E. View transparencies.

  F. Read assignment sheets.

  G. Complete assignment sheets.

  H. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objectives

B. Information sheet

C. Transparency masters

1. VIII-TM-1--Main Numeric File
2. VIII-TM-2--Coding and Storing Correspondence Numerically
3. VIII-TM-3--Index Card Control File
4. VIII-TM-4--Cross-Reference Card
5. VIII-TM-5--Accession Book
6. VIII-TM-6--Numeric Filing Procedure
7. VIII-TM-7--Terminal-Digit Filing
8. VIII-TM-8--Terminal-Digit System
9. VIII-TM-9--Alpha-Numeric System

D. Assignment sheets

1. Assignment Sheet #1--Consecutive Number Filing
2. Assignment Sheet #2--Terminal-Digit Filing

E. Answers to assignment sheets

F. Test

G. Answers to test

II. References:

A. Books

1. Bassett, Ernest D. and David G. Goodman. Business Filing and Records Control. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

2. Gregg, John Robert and others. Applied Secretarial Practice. 7th ed. Dallas, Texas: Gregg Division, McGraw-Hill Book Co., 1974.

3. Kahn, Gilbert and others. Progressive Filing. 8th ed. New York, New York: McGraw-Hill Book Company, 1969.

4. Meehan, James R. and others. Clerical Office Procedures. 5th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

5. Meehan, James R. and others. *Secretarial Office Procedures*. 8th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

6. Sherster, Joyce. *File Clerk*. New York, New York: McGraw-Hill Book Company, 1973.

7. Wood, Merle W. and Margaret A. McKenna. *The Receptionist*. New York, New York: McGraw-Hill Book Company, 1966.

B. Additional References

1. Practice Sets

a. Bassett, Ernest D. and David G. Goodman. *Office Filing Procedures*. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

b. Kahn, Gilbert and others. *Gregg Quick Filing Practice*. New York, New York: McGraw-Hill Book Company, 1965.

c. Kahn, Gilbert and others. *Progressive Filing Practice Set*. New York, New York: McGraw-Hill Book Company, 1969.

2. Workbooks

a. Guthrie, Mearl R. *Alphabetic Indexing*. Cincinnati, Ohio: South-Western Publishing Co., 1964.

b. Wood, Merle W. *Number Filing on the Job*. Cincinnati, Ohio: South-Western Publishing Co., 1972.

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UNIT VIII

FILING MATERIALS NUMERICALLY

INFORMATION SHEET

I. Definition of terms

A. Numeric filing--Is a method of filing by numbers instead of names

B. Numeric file--One which contains guides and folders with captions made up of numbers

C. Alphabetic miscellaneous file--One which contains alphabetically filed papers of correspondents who have not been assigned numbers because the volume of correspondence with them is not yet large enough

D. Card file (card index)--One which contains the names of correspondents and any subjects alphabetically arranged

E. Register (accession record, acquisition book)--A book which contains a record of the numbers already assigned to correspondents and subjects. It shows the next number available for assignment.

F. Terminal-digit file--One in which numbers are read in groups from right to left rather than left to right

G. Alpha-numeric file (alpha-number, skip number)--One in which omission of numbers in a sequence may be used when assigning numbers to names so that the alphabetic as well as the numeric sequence may be maintained

H. Consecutive-number file (serial-number file)--One in which a number is assigned to each correspondent or subject that warrants an individual folder

I. Chronological file--Is one in which correspondence is filed by date

II. Advantages and disadvantages of numeric filing

A. Advantages

1. Greater ease of filing and refiling policy or case numbers in insurance companies, law firms, and

welfare agencies; contract, job, or stock numbers of firms in building trades; purchase orders, sales orders, charges or payments on account in all companies; and in state offices (Automobile license files; Social Security files).

2. Expansion is easy and unlimited
3. Transfer of inactive records is facilitated
4. Cross-references do not conjest file drawer
5. Insures privacy of information contained in the file
6. Fewer errors may occur in matching invoices and payments, for example.
7. Names and addresses are quickly and easily obtained from the card file.
8. Time and effort in labeling is saved.
9. Misfiled folders are easily detected.

B. Disadvantages

1. It is an indirect method of filing because in most cases before records can be retrieved, the worker must refer to an alphabetic card file to find the number assigned to the name of the subject.
2. Transposition of numbers may easily occur.
3. More equipment is necessary.
4. Two methods of filing are involved.
5. Time in sorting is wasted.

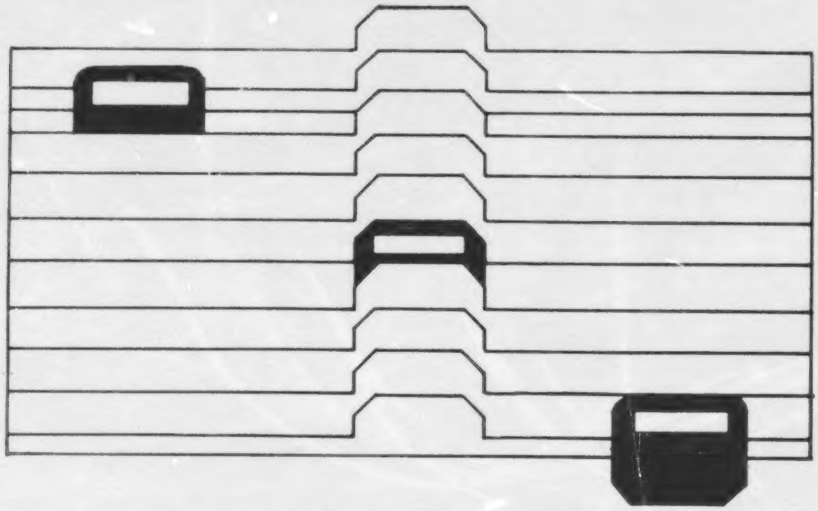
III. Basic features of a numeric file

A. Main numeric file--one which contains guides and individual folders bearing numeric captions

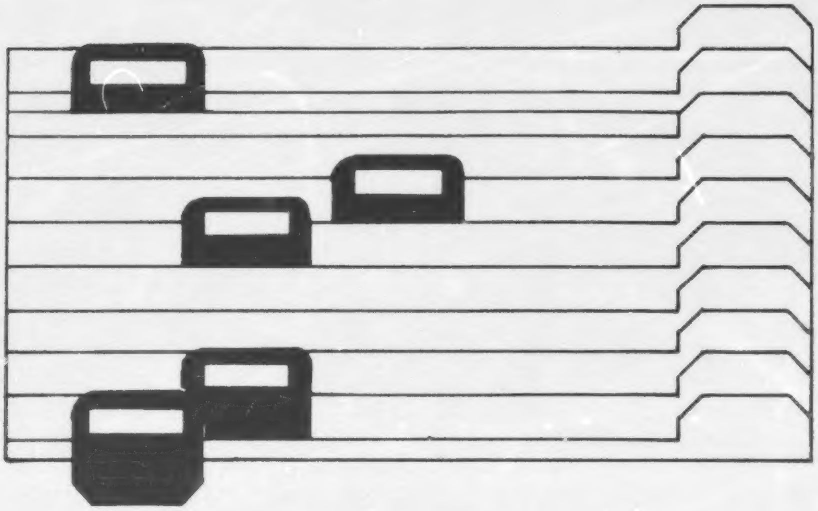
1. Characteristics
    a. A number is assigned consecutively to each correspondent or subject that warrants an individual folder.
    b. Once a number is assigned, it is maintained until a correspondent no longer does business with a firm or a subject ceases to exist.

2. Methods of arranging guides and folders

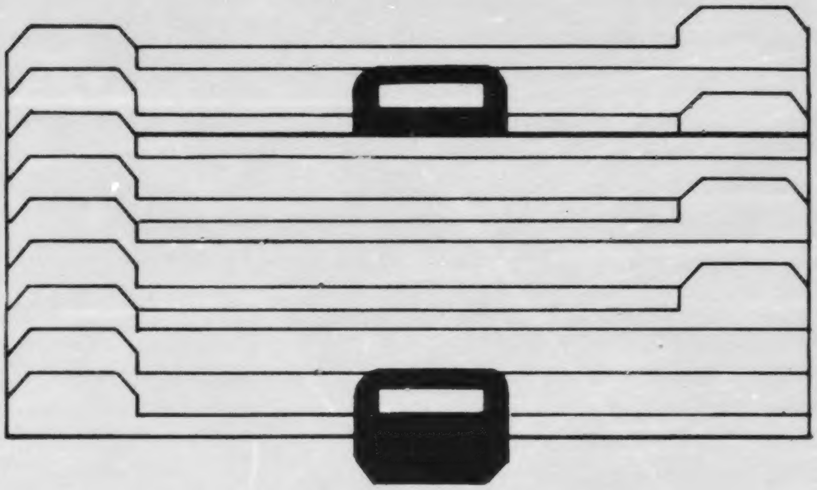
   a. The guides are staggered in three positions across the file drawer, and the folders are arranged in numerical sequence behind the proper guide.



   b. The guides are in two or three positions at the left only and the folders with tabs are in the last position on the right.



c. The guides appear in the center only, and the folders with tabs are used in two positions to the right and the left of the guide.



B. Miscellaneous alphabetic file

1. Correspondents or subjects with less than five papers are filed alphabetically in the miscellaneous file.

2. Location

   a. Front part of the first filing drawer of the main numeric file

   b. In a separate drawer of the main numeric file

   c. In an entirely separate filing cabinet

3. Transfering to the main numeric file

   a. Correspondents or subjects with five or more papers

   b. The first unused number is assigned to that correspondent or subject.

   c. Papers are transferred to the folder of that number.

   d. Folder is put in the main numeric file.

   (NOTE: The file number for a new name is determined by checking the first unused folder and/or the register.)

C. Card file

1. Alphabetically arranged

2. Each contains the name and address of a correspondent or subject and the number of the folder that has been assigned.

3. M - the symbol used on cards of correspondents and subjects whose records are stored in the miscellaneous alphabetic file

   (NOTE: The M is replaced by a permanent number if the correspondent or subject is assigned an individual folder in the main numeric file.)

D. Cross-reference

1. Tells where the record is actually stored

2. Done only in the card index. (In the example shown, someone needing information on Fuzy Seal Drug Store would be referred to Walgreen Drugs, Inc. in folder number 319.)

Fuzy Seal Drug Store
Tyler, Texas

SEE: Walgreen Drugs, Inc. 319

IV. Numeric filing procedure

A. Code

1. If the card file shows that no number has been assigned to a correspondent or subject, an M is placed in the upper right corner to indicate the record is to be stored in the miscellaneous alphabetic file.

2. A colored pencil may be used for coding.

B. Sort

1. Records are arranged first by hundreds, then by tens, and finally into correct numeric order.

2. The records coded M are placed in one pile during numeric sorting and are then sorted alphabetically.

C. Store

1. Records coded M are placed in the correct folder in the miscellaneous alphabetic file.

2. Numerically coded records are filed in the numeric file.

(NOTE: Care should be exercised in reading the coded numbers and the folder numbers to avoid transposition of figures, such as 2478 for 2748.)

D. Charge-out and follow-up

1. Request records.

2. Fill out requisition form.

3. Locate and remove record from the files.

4. Replace the record with an OUT form.

5. Place duplicate copy of requisition in file folder.

6. Place duplicate copy of requisition in tickler file.

7. Check tickler file daily for return of files.

8. Follow-up on ON-CALL cards.

9. Remove all OUT cards from the files and tickler files when records are returned.

10. Cross-out all information recorded on OUT cards indicating that the OUT card is ready to use for another request.

11. Store cards, folders, etc. for reuse.

V. Other numeric filing methods

  A. Chronologic - filing by date

  B. Terminal-digit

    1. Groups of digits are identified as primary, secondary, and final numbers.

Example:	1092-	70 -	435	J. Doe's social
	Final	Secondary	Primary	security number.

    2. Primary digits indicate a drawer number.

    3. Secondary digits indicate guide numbers.

    4. Final digits indicate the order of arrangement behind a certain guide.

  C. Alpha-numeric

    1. Names of correspondents arranged in alphabetic sequence may be assigned numbers.

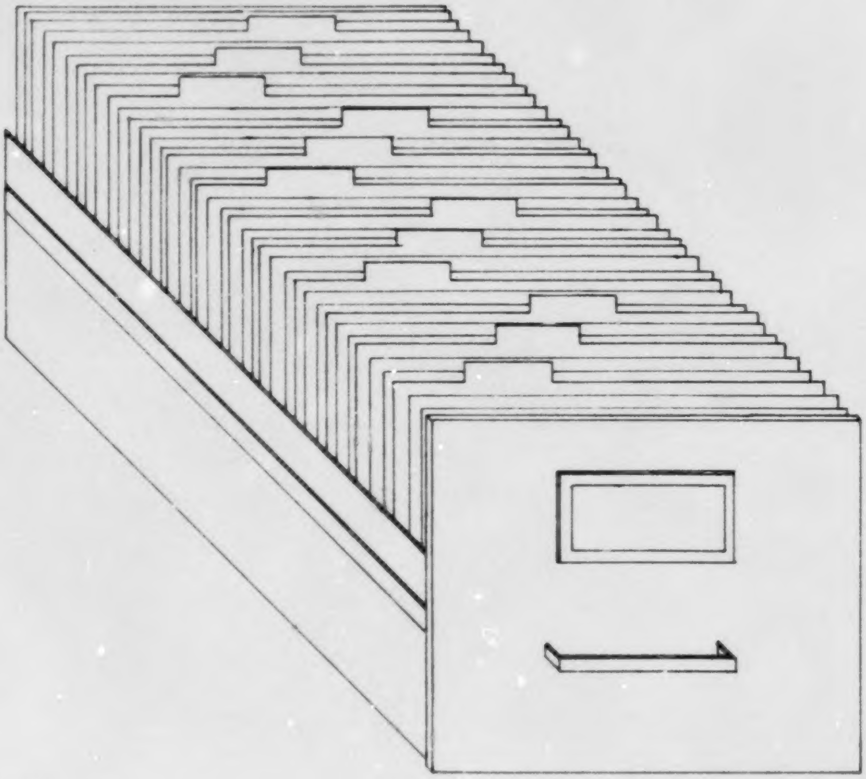
    2. Intervals of a hundred numbers should be left available for the numbering of new correspondents' names.

    3. When problems may occur in maintaining the absolute alphabetic sequence:

      a. Accept less than strict alphabetic sequence.

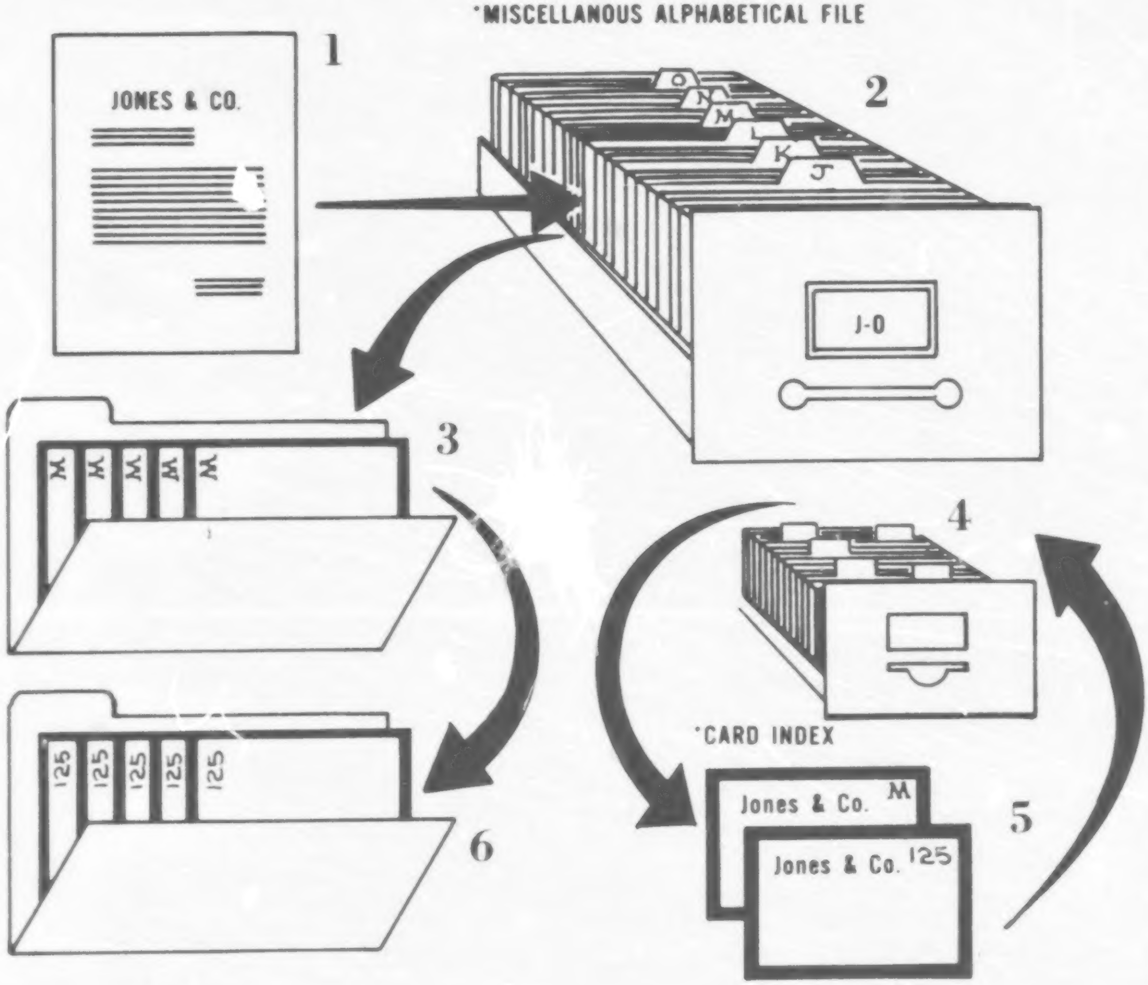
      b. Renumber all names.

      c. Add another digit at the end of each number.



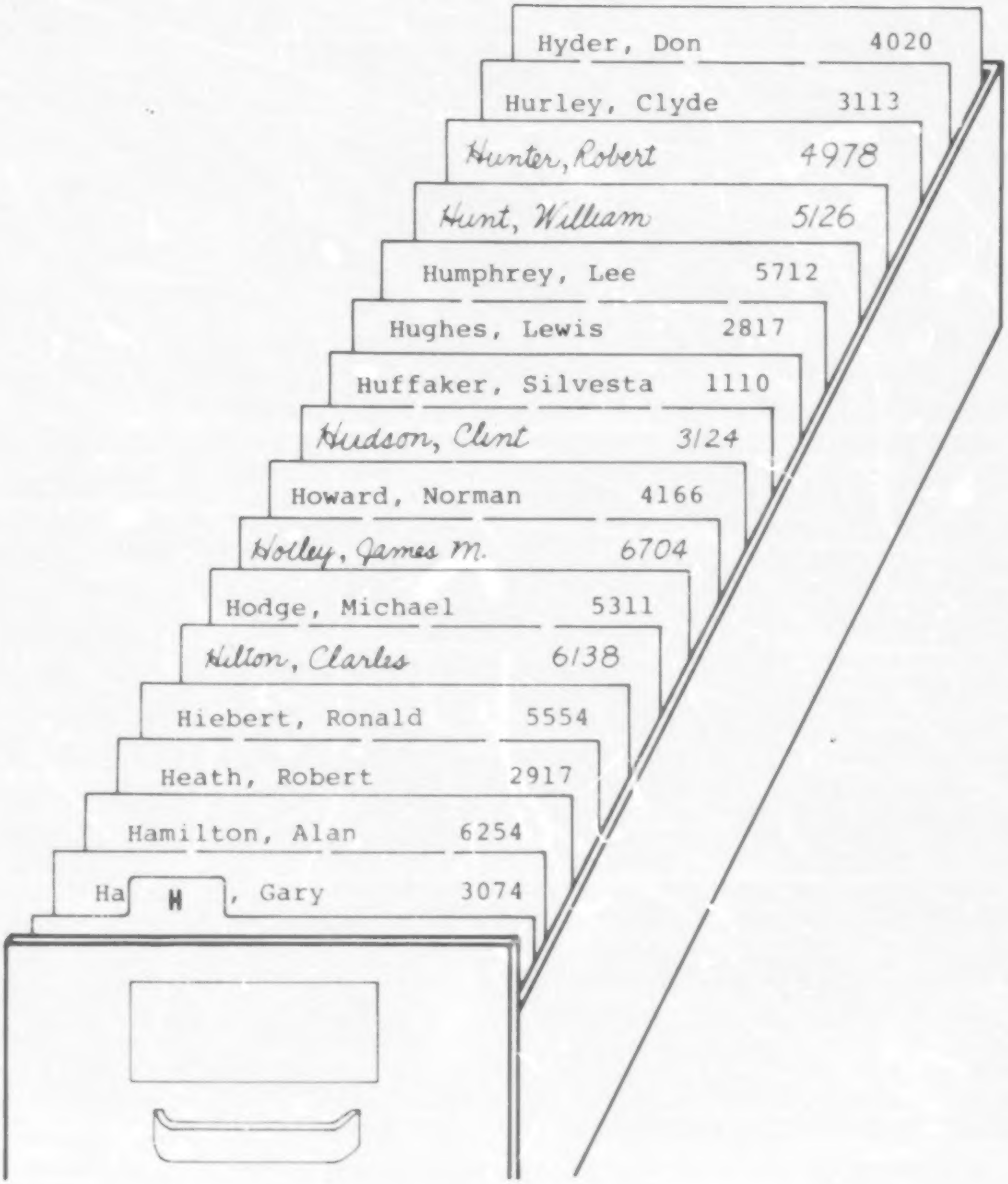
MAIN NUMERIC FILE

CODING & STORING CORRESPONDENCE NUMERICALLY



An incoming record from a new correspondent (1) is coded "M" and stored in the miscellaneous alphabetic file. (2) As soon as five records concerning this correspondent accumulate (3) the card index (4) is consulted. The next unassigned number (5) is given to this correspondent and the notation on the card is changed from "M" to "125". The records are then recoded "125" and transferred to a numeric folder (6), which is stored in the main numeric file.

INDEX CARD CONTROL FILE



CROSS-REFERENCE CARD

Fuzy Seal Drug Store
Tyler, Texas

SEE: Walgreen Drugs, Inc. 319

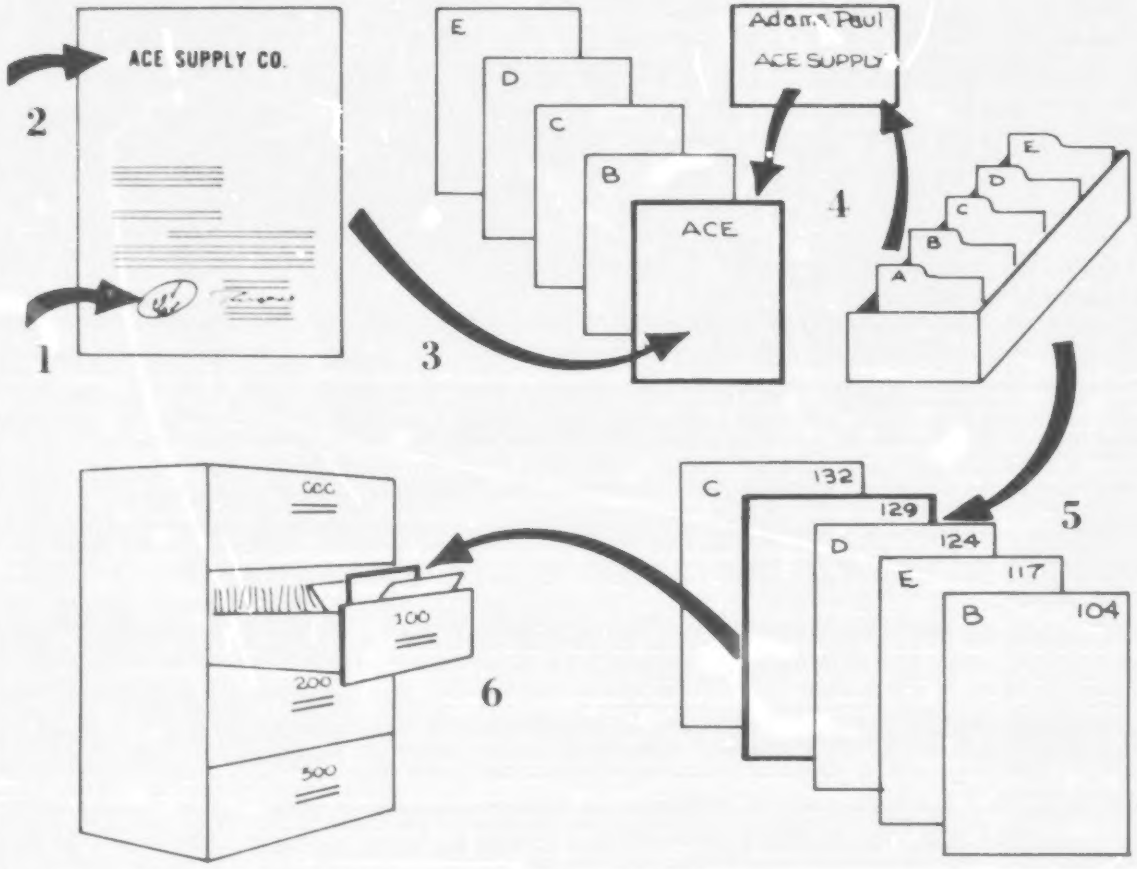
14.0302-VIII-TM-4

VIII-321

ACCESSION BOOK

	ACCESSION BOOK	PAGE 45
Number	**Name**	**Date**
2365	Joseph Arnold	June 7, 1977
2366	Gary Miller	June 9, 1977
2367	Donald Wilson	June 10, 1977
2368	Frank Rogers	June 14, 1977

NUMERIC FILING PROCEDURE



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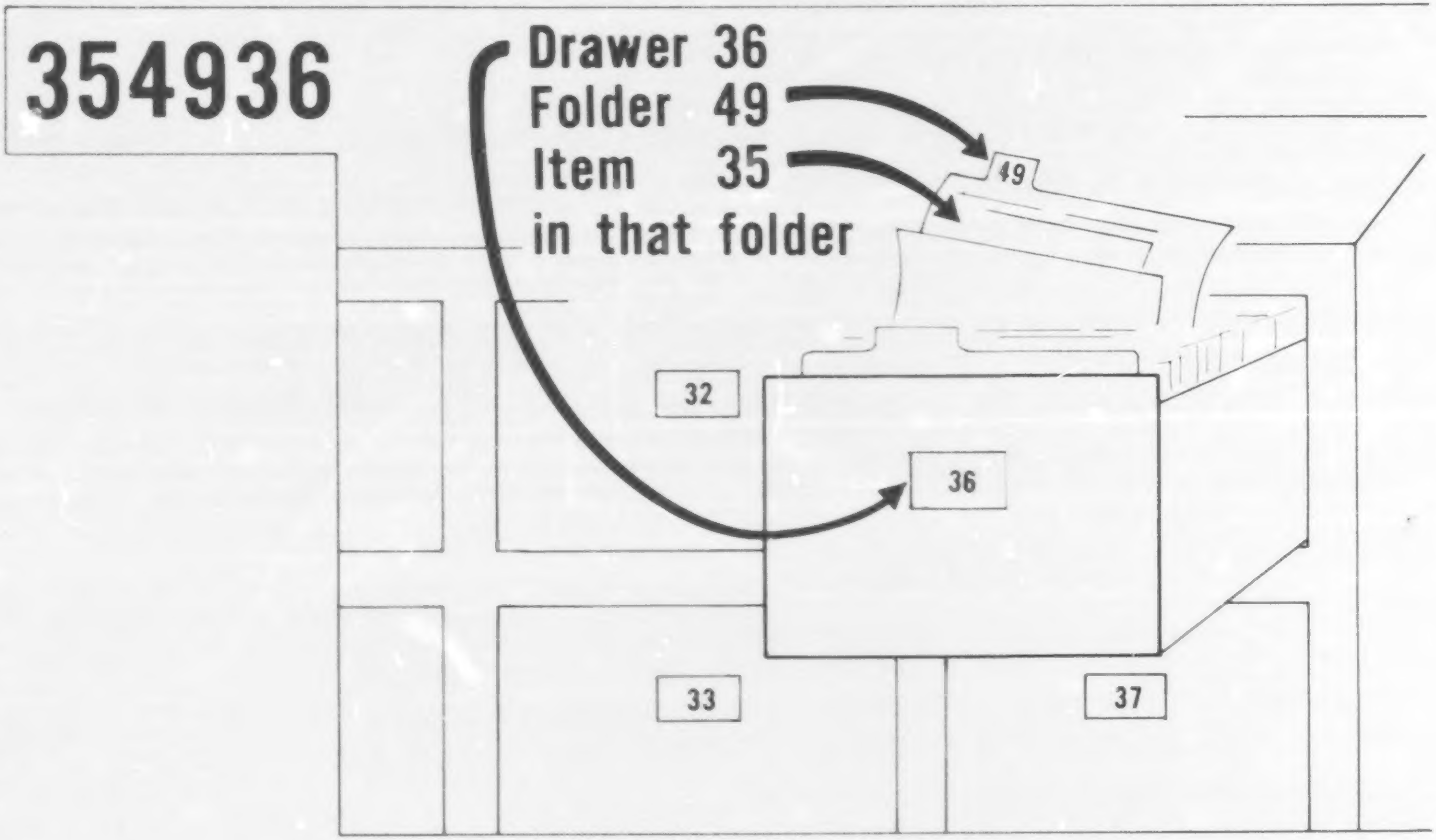
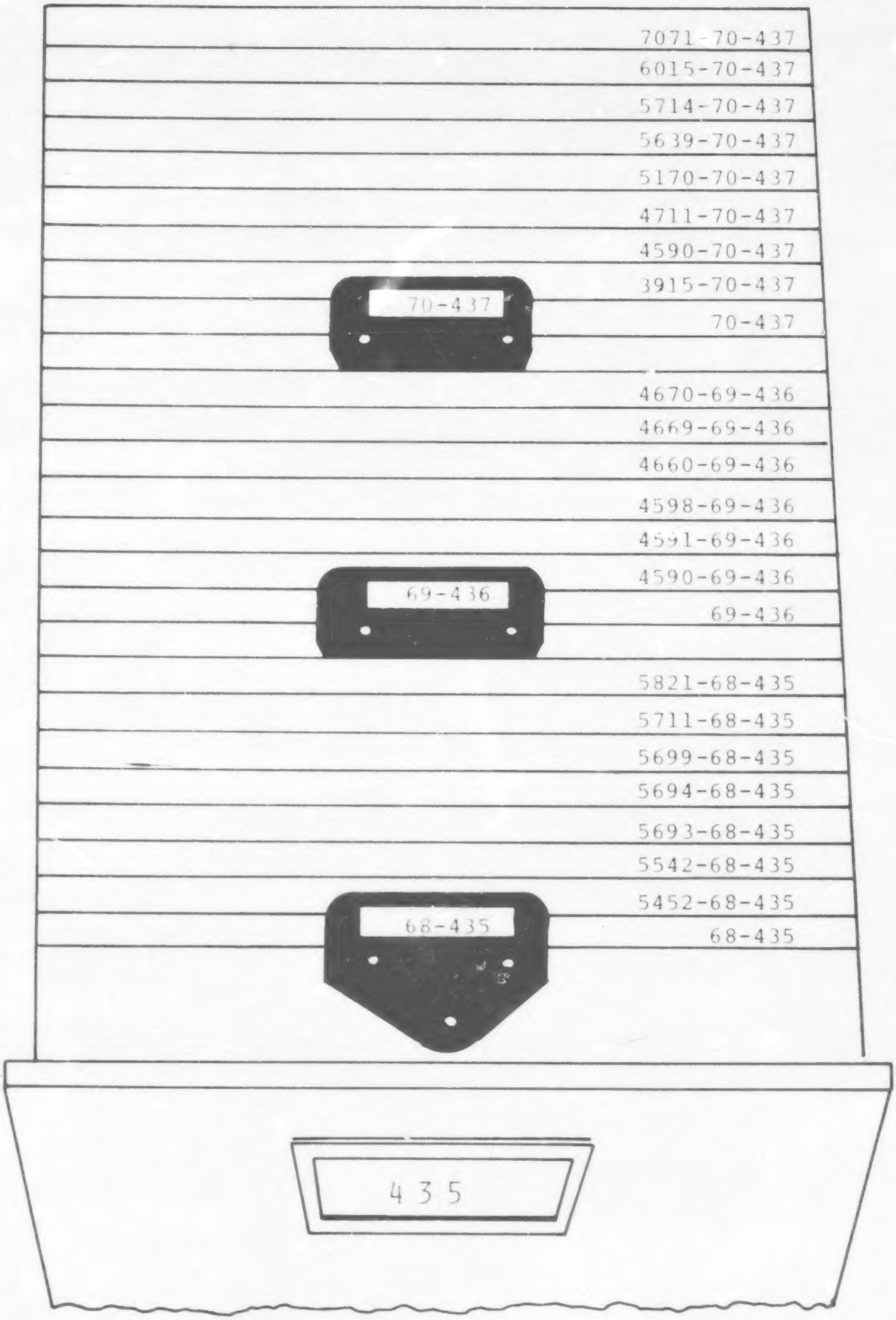
TERMINAL DIGIT FILING



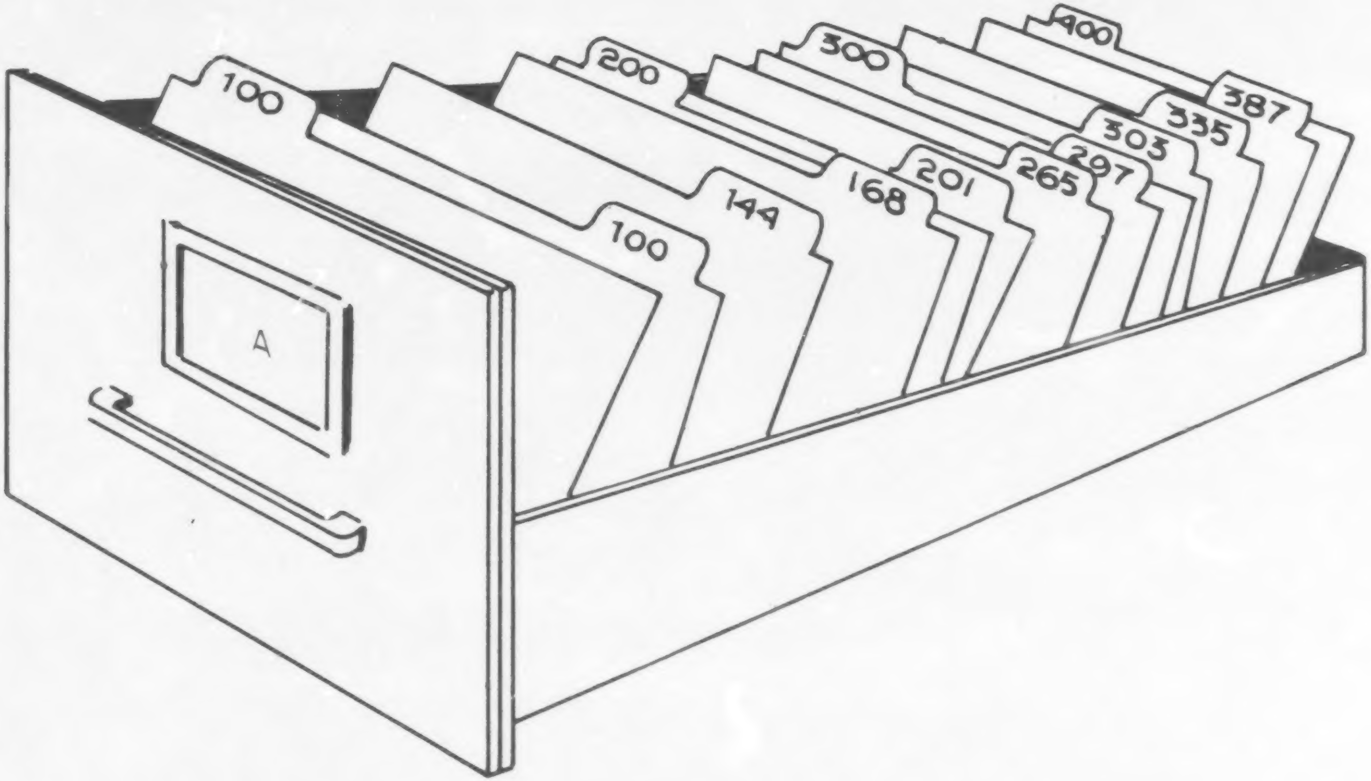
354936

Drawer 36
Folder 49
Item 35
in that folder

TERMINAL DIGIT SYSTEM



ALPHA—NUMERIC SYSTEM



14.0302-VIII-TM-9

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UNIT VIII

FILING MATERIALS NUMERICALLY

ASSIGNMENT SHEET #1--CONSECUTIVE NUMBER FILING

Directions: In the following assignment, assume you are the file clerk for Hall and Associates, a distributor of various crafts. On your desk you have some correspondence from several of your company's customers which needs to be filed in the numeric filing system. Listed below is the necessary information needed to file the new correspondence. This information is taken from: the new correspondence, the main numeric file, the miscellaneous alphabetic file, and the card file.

A. Explain in a paragraph how you would file this correspondence.

B. Update the files by marking out names or numbers in one file and adding it on to the proper file. The numbers in parentheses indicate the pieces of correspondence from that customer.

EXAMPLE

NECESSARY INFORMATION

MAIN NUMERIC FILE	MISCELLANEOUS ALPHABETIC FILE	CARD FILE	NEW CORRESPONDENCE
1 Jack Brothers	Pizza Hut (2)	1 Jack Brothers Time, WA	Pizza Inn (1)
2 Tony's Pizza	Pizza Inn (4)		Butch's Barn (2)
3 Spaghetti House		M Pizza Hut Harly, OR	Pizza Hut (1)
		M Pizza Inn Denton, MA	
		3 Spaghetti House Deute, OH	
		2 Tony's Pizza Newton, CA	

INFORMATION UPDATED

1 Jack Brothers	Butch's Barn (2)	M Butch's Barn Thomas, RI	~~Pizza Inn (1)~~
2 Tony's Pizza	Pizza Hut (~~2~~)(3)		~~Butch's Barn (2)~~
3 Spaghetti House	~~Pizza Inn (4)(5)~~	1 Jack Brothers Time, WA	~~Pizza Hut (1)~~
4 Pizza Inn		M Pizza Hut Harly, OR	
		4 ~~M~~ Pizza Inn Denton, MA	
		3 Spaghetti House Deute, OH	
		2 Tony's Pizza Newton, CA	

To file Pizza Inn (1), check the card file to find its location; it is in the miscellaneous alphabetic file because it is coded "M". It has four pieces of correspondence. These four plus one new piece equals five. (Rule - five or more pieces of correspondence are assigned a number in the main numeric file.) Mark it out of the miscellaneous alphabetic file and write it in the main numeric file along with the next consecutive number. Be sure to change the "M" in the card file to "4".

To file Butch's Barn (2), check the card file; no previous correspondence found. Find the proper alphabetic sequence; write in the name and address; code the card "M". Find the proper alphabetic sequence in the miscellaneous alphabetic file; write it in along with the number of pieces of correspondence.

To file Pizza Hut (1), check the card file; it is in the miscellaneous alphabetic file. It has two pieces of correspondence. These two plus one new piece equals three. Mark out (2) and write in (3).

Necessary Information for Assignment Sheet #1

MAIN NUMERIC FILE

101	Jones Brothers
102	Day Pottery
103	Art Crafts
104	Jewelry Crafts

Necessary Information for Assignment Sheet #1

MISCELLANEOUS ALPHABETIC FILE

Arts and Crafts	(4)
Beautiful Things	(3)
Fine Pottery	(1)
Homemade Crafts	(2)
Plants Galore	(1)
Ready-Made Macrame	(4)
Sheila's Stitchery	(2)
Thomas Weavers	(4)

Necessary Information for Assignment Sheet #1

CARD FILE

103 Art Crafts
111 Time Street
Home, TX 77143

M Arts and Crafts
91 Leslie
Canton, TX 75411

M Beautiful Things
10 Jamacia
Potsboro, TX 71103

102 Day Pottery
17 Front Street
Potsboro, TX 71103

M Fine Pottery
57 Downing
Farmer's Branch, TX 71104

M Homemade Crafts
723 Woody Lane
Dallas, TX 75430

104 Jewelry Crafts
59 Richmond
Ft. Worth, TX 75400

101 Jones Brothers
51 Orbit
Sun City, TX 75109

M Plants Galore
97 Holly Avenue
Louisville, TX 79103

M Ready-Made Macrame
78 Gulfton
Canton, TX 75411

M Shelia's Stitchery
15 State Street
Commerce, TX 75428

M Thomas Weavers
695 University Drive
Commerce, TX 75428

Necessary Information for Assignment Sheet #1

NEW CORRESPONDENCE

Homemade Crafts (1)
723 Woody Lane
Dallas, TX 75430

Beads n' Things (2)
141 Third Street
Dallas, TX 75430

Arts and Crafts (2)
91 [illegible]eslie
Canton, TX 75411

The Hobby Shop (3)
East Morris
Louisville, TX 79103

Thomas Weaver's (1)
695 University Drive
Commerce, TX 75428

The Summer House (1)
14 Ash Street
Commerce, TX 75428

The Card N Gift Shop (5)
713 Green Street
Emory, TX 51179

Shelia's Stitchery (2)
21 Thomas Boulevard
Greenville, TX 54189

Stainglass Makers (3)
54 Louis Street
Paris, TX 55410

The Craft Shop (1)
19 Caston Avenue
Paris, TX 55410

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UNIT VIII

FILING MATERIALS NUMERICALLY

ASSIGNMENT SHEET #2--TERMINAL-DIGIT FILING

Directions: The following is a list of social security numbers. Put them in numerical order and then draw a file drawer around them, placing the proper numbers on the drawer and guides.

1. 4112-70-435
2. 5452-68-435
3. 4544-71-435
4. 5639-69-435
5. 4710-71-435
6. 4602-70-435
7. 4444-71-435
8. 4547-71-435
9. 4542-69-435
10. 4113-70-435
11. 5693-68-435
12. 5432-70-435
13. 5542-68-435
14. 5639-70-435

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UNIT VIII

FILING MATERIALS NUMERICALLY

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

A. First a file clerk would inspect the correspondence to determine the correspondent and check for release marks. If the alphabetic coding has been previously done, the file clerk would check it for accuracy. Otherwise code in the usual manner. If the volume of correspondence is large, sort first by alphabet. The card file should be consulted next. This tells the file clerk if a card has been prepared for that correspondent and, if so, whether a number or the letter "M" has been assigned to the correspondent. If the correspondent has a number, the new correspondence should be coded with that number and placed in the numeric sorter. If the correspondent has a "M", code the new correspondence with the letter "M" and place in an alphabetic sorter. If the correspondent is not in the card file, the file clerk should prepare a card and code the card and the correspondence with an "M". Cross-reference cards should be made when necessary also. This correspondence is also put in the alphabetic sorter. The new card should be put in the correct alphabetic order in the card file. Correspondence is now taken from the sorters to the files. Numerically coded correspondence is filed in the corresponding number folders. All correspondence coded with an "M" is filed in the miscellaneous alphabetic folder by names first and then by date. If five pieces or more from one correspondent have accumulated in the miscellaneous alphabetic folder, the file clerk should remove the correspondence from the folder and

   a. Consult accession book to determine the code number to be used and write the name beside it,
   b. Cross out "M" on index card and put assigned number above it. Refile in proper alphabetic sequence,
   c. Open a new folder with assigned number on tab. Place all correspondence dealing with that correspondent in folder with most recent date in front, and
   d. Place folder in correct numeric sequence.

B. MAIN NUMERIC FILE

101 Jones Brothers

102 Day Pottery

103 Art Crafts

104 Jewelry Crafts

105 Arts and Crafts

106 Thomas Weavers

107 Card n' Gift Shop, The

MISCELLANEOUS ALPHABETIC FILE

~~Arts and Crafts (4)(6)~~

Beads n' Things (2)

Beautiful Things (3)

Craft Shop, The (1)

Fine Pottery (1)

Hobby Shop, The (3)

Homemade Crafts (~~2~~)(3)

Plants Galore (1)

Ready-Made Macrame' (4)

Sheila's Stitchery (~~2~~)(4)

Stainglass Makers (3)

Summer House, The (1)

~~Thomas Weavers (4)(5)~~

CARD FILE

103 Art Crafts
111 Time Street
Home, TX 77143

105 M Arts and Crafts
91 Leslie
Canton, TX 75411

M Beads n' Things
141 Third Street
Dallas, TX 75430

M Beautiful Things
10 Jamacia
Potsboro, TX 71103

107 Card n' Gift Shop, The
713 Green Street
Emory, TX 51179

M Craft Shop, The
19 Caston Avenue
Paris, TX 55410

102 Day Pottery
17 Front Street
Potsboro, TX 71103

M Fine Pottery
57 Downing
Farmer's Branch, TX 71103

M Hobby Shop, The
East Morris
Louisville, TX 79103

M Homemade Crafts
723 Woody Lane
Dallas, TX 75430

104 Jewelry Crafts
59 Richmond
Ft. Worth, TX 75400

101 Jones Brothers
51 Orbit
Sun City, TX 75109

M Plants Galore
97 Holly Avenue
Louisville, TX 79103

M Ready-Made Macrame'
78 Gulfton
Canton, TX 75411

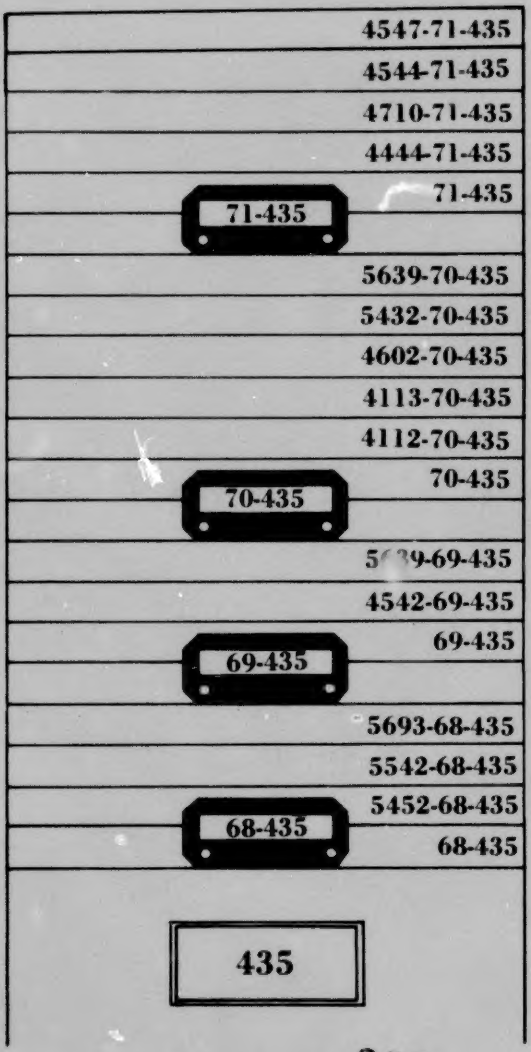
M Sheila's Stitchery
15 State Street
Commerce, TX 75428

M Stainglass Makers
54 Louis Street
Paris, TX 55410

M Summer House, The
14 Ash Street
Commerce, TX 75428

106 M Thomas Weavers
695 University Drive
Commerce, TX 75428

Assignment Sheet #2



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UNIT VIII

FILING MATERIALS NUMERICALLY

UNIT TEST

1. Match the terms on the right to the correct definition.

_____ a. Is one in which omission of numbers in a sequence may be used when assigning numbers to names so that the alphabetic as well as numeric sequence may be maintained

_____ b. Contains a record of the numbers already assigned to correspondents and subjects

_____ c. Is one in which numbers are read in groups from right to left rather than left to right

_____ d. One in which correspondence or subjects are filed by date

_____ e. One which contains alphabetically filed papers of correspondents who have not been assigned numbers because the volume of correspondence with them is not yet large enough

_____ f. One which contains the names of correspondents and any subjects alphabetically arranged

_____ g. One which contains guides and folders with captions made up of numbers

_____ h. One by numbers instead of names

1. Chronologic file
2. Numeric file
3. Register
4. Card file
5. Alpha-numeric file
6. Numeric filing
7. Alphabetic Miscellaneous file
8. Terminal-digit file
9. Consecutive-number file

_____ i. One in which a number is assigned to each correspondent or subject that warrants an individual folder

2. Discuss the advantages and disadvantages of numeric filing.

3. Explain the basic features of a numeric file.

4. List the steps in the numeric filing procedure.

5. Explain the differences in the other numeric filing systems.

6. Demonstrate the ability to:

   a. File correspondence in a consecutive number file.

   b. File correspondence in a terminal-digit file.

   (NOTE: If the skills have not been accomplished prior to the test, ask the instructor when they should be completed.)

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UNIT VIII

FILING MATERIALS NUMERICALLY

ANSWERS TO TEST

1. 5 a.

   3 b.

   8 c.

   1 d.

   7 e.

   4 f.

   2 g.

   6 h.

   9 i.

2. a. Advantages

   1) Greater ease of filing policy or case numbers in insurance companies, law firms, and welfare agencies; contract, job, or stock numbers in firms in building trades; purchase orders, sales orders, charges or payments on account in all companies; and in state offices - automobile license files, social security files.

   2) Expansion is easy and unlimited.

   3) Transfer of inactive records is facilitated.

   4) Cross-references do not conjest file drawers.

   5) Insures privacy of information contained in the files.

   6) Fewer errors may occur in matching invoices and payments.

   7) Names and addresses are quickly and easily obtained from the card file.

   8) Time and effort in labeling is saved.

9) Misfiled folders are easily detected.

b. Disadvantages

1) Indirectness of filing

2) Transposition of numbers may easily occur.

3) More equipment is necessary.

4) Two methods of filing are involved.

5) Time in sorting is wasted.

3. Main numeric file is one which contains guides and individual folders bearing numbers and captions. A number is assigned to each correspondent or subject that warrants an individual folder. All papers pertaining to that correspondent or subject are placed in the individual folder which bears the number given that correspondent or subject.

Miscellaneous alphabetic file contains correspondents or subjects with less than five papers. These are filed alphabetically in the first file drawer of the main numeric system, in a separate drawer, or an entirely different filing cabinet.

Card file is alphabetically arranged and contains the names and addresses of each correspondent or subject and the number of the folder that it is in. Correspondents or subjects with less than five papers have an M on their card to indicate they are located in the miscellaneous alphabetic file.

Cross-references tell where the paper is actually stored and are filed in the card file.

4. Coding - M if it is a new correspondent. The number the card file shows for that correspondent should be written on new papers from established correspondents.

Sorting - M coded records are filed alphabetically. Records are arranged by hundreds, tens, and then in numerical order.

Storing - M coded records are filed in the miscellaneous alphabetic file. Numerically coded records are filed in the numeric file.

Charge-out and follow-up

5. Chronologic - filed by date

Terminal-digit - number considered in filing is read from right to left rather than left to right.

Alpha-numeric - filed by number and by letter.

6. Evaluated to the satisfaction of the instructor.

14.0302

UNIT IX

FILING MATERIALS GEOGRAPHICALLY

TERMINAL OBJECTIVE

After completing this unit the student will be able to cite advantages and disadvantages in geographic filing, determine geographic filing divisions, arrange a file drawer geographically, and file materials geographically. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit the student will be able to:

1. Cite advantages and disadvantages in geographic filing.
2. Determine filing divisions.
3. Arrange a file drawer geographically.
4. Discuss the use of the card index in geographic filing.
5. List the types of cross-referencing in geographic filing.
6. Explain the geographic filing procedure.
7. Demonstrate the ability to:
    a. Determine filing divisions of a geographic file.
    b. Differentiate between geographic and other methods of filing.

14.0302

UNIT IX

FILING MATERIALS GEOGRAPHICALLY

SUGGESTED ACTIVITIES

I. Instructor:

- A. Provide objective sheet.
- B. Discuss objective sheet.
- C. Provide information sheet.
- D. Discuss information sheet.
- E. Show transparencies.
- F. Provide assignment sheets.
- G. Discuss assignment sheets.
- H. Provide additional jobs in applicable exercise papers.
- I. Discuss additional jobs in applicable exercise papers.
- J. Give test and evaluate results.

II. Student:

- A. Read objective sheet.
- B. Participate in discussion of objective sheet.
- C. Read information sheet.
- D. Participate in discussion of information sheet.
- E. View transparencies.
- F. Read assignment sheets.
- G. Complete assignment sheets.
- H. Read additional jobs in applicable exercise papers.
- I. Complete additional jobs in applicable exercise papers.
- J. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objectives

   B. Information sheet

   C. Transparency masters

      1. IX-TM-1--Geographic Arrangement of Guides and Folders

      2. IX-TM-2--Steps in Geographic Filing of Correspondence

   D. Assignment sheets

      1. Assignment Sheet #1--Determining Divisions

      2. Assignment Sheet #2--Geographic Filing Procedure

   E. Answers to assignment sheets

   F. Additional jobs in applicable exercise papers

   G. Test

   H. Answers to test

II. References:

   A. Books

      1. Bassett, Ernest D. and David G. Goodman. Business Filing and Records Control. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

      2. Gregg, John Robert and others. Applied Secretarial Practice. 7th ed. Dallas, Texas: Gregg Division, McGraw-Hill Book Co., 1974.

      3. Kahn, Gilbert and others. Progressive Filing. 8th ed. New York, N.Y.: McGraw-Hill Book Company, 1969.

      4. Meehan, James R. and others. Clerical Office Procedures. 5th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

5. Meehan, James R. and others. *Secretarial Office Procedures*. 8th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

6. Sherster, Joyce. *File Clerk*. New York, N.Y.: McGraw-Hill Book Company, 1973.

7. Wood, Merle W. and Margaret A. McKenna. *The Receptionist*. New York, N.Y.: McGraw-Hill Book Company, 1966.

B. Practice Sets

1. Bassett, Ernest D. and David G. Goodman. *Office Filing Procedures*. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

2. Kahn, Gilbert and others. *Gregg Quick Filing Practice*. New York, N.Y.: McGraw-Hill Book Company, 1965.

3. Kahn, Gilbert and others. *Progressive Filing Practice Set*. New York, N.Y.: McGraw-Hill Book Company, 1969.

C. Workbooks

1. Guthrie, Mearl R. *Alphabetic Indexing*. Cincinnati, Ohio: South-Western Publishing Co., 1964.

2. Wood, Merle W. *Number Filing on the Job*. Cincinnati, Ohio: South-Western Publishing Co., 1972.

14.0302

UNIT IX

FILING MATERIALS GEOGRAPHICALLY

INFORMATION SHEET

I. Advantages and disadvantages of geographic filing

  A. Advantages

    1. Allows direct filing and provides reference for geographic areas

    2. Provides for miscellaneous records

    3. Permits grouping of records by location

  B. Disadvantages

    1. Requires location as well as name

    2. Necessitates triple sorting

    3. Increases labor costs

    4. Increases possibility of error

    5. Necessitates reference card index

    6. Requires detailed descriptions on folder labels

    7. Creates confusion in miscellaneous files

II. Factors determining divisions of geographic file

  A. Type of business being operated

  B. Geographical areas of correspondence

  C. Use of files

III. Types of guides and folders

  A. Guides

    1. Primary guides - names of the largest or most important geographic divisions, such as states or provinces

2. Secondary guides - subdivisions of the divisions indicated by the primary guides, such as cities or counties

B. Folders

1. All folder labels should be consistent and contain:
    a. the location of the correspondent on the first line (both city and state).
    b. the name of the correspondent on the second line.
2. Miscellaneous folders
    a. For every guide there is a similarly labeled miscellaneous folder into which all miscellaneous correspondence pertaining to that locality is filed.
    b. Every miscellaneous folder should be alphabetized by state and city.
3. Individual folders
    a. When five or more pieces of correspondence are accumulated from one correspondent, an individual folder should be prepared.

        Example: Correspondence from a salesman at a branch office

    b. Correspondence within the individual folder is arranged chronologically, with the latest date in front.

IV. Characteristics of a card index in geographic filing

A. Arranged alphabetically by names of correspondents.

B. Used as a quick reference when the geographic location cannot be remembered

V. Types of cross-references in geographic filing

A. Not likely to occur again - use cross-reference sheet.

B. Permanent - manila tabbed cross-reference form is used.

C. From individual to a location - card index must be utilized.

VI. Geographic filing procedure

A. Inspect

B. Code - correspondence location marked first

C. Cross-reference

D. Sort - by location first

E. File

1. Check card file

2. File in usual manner

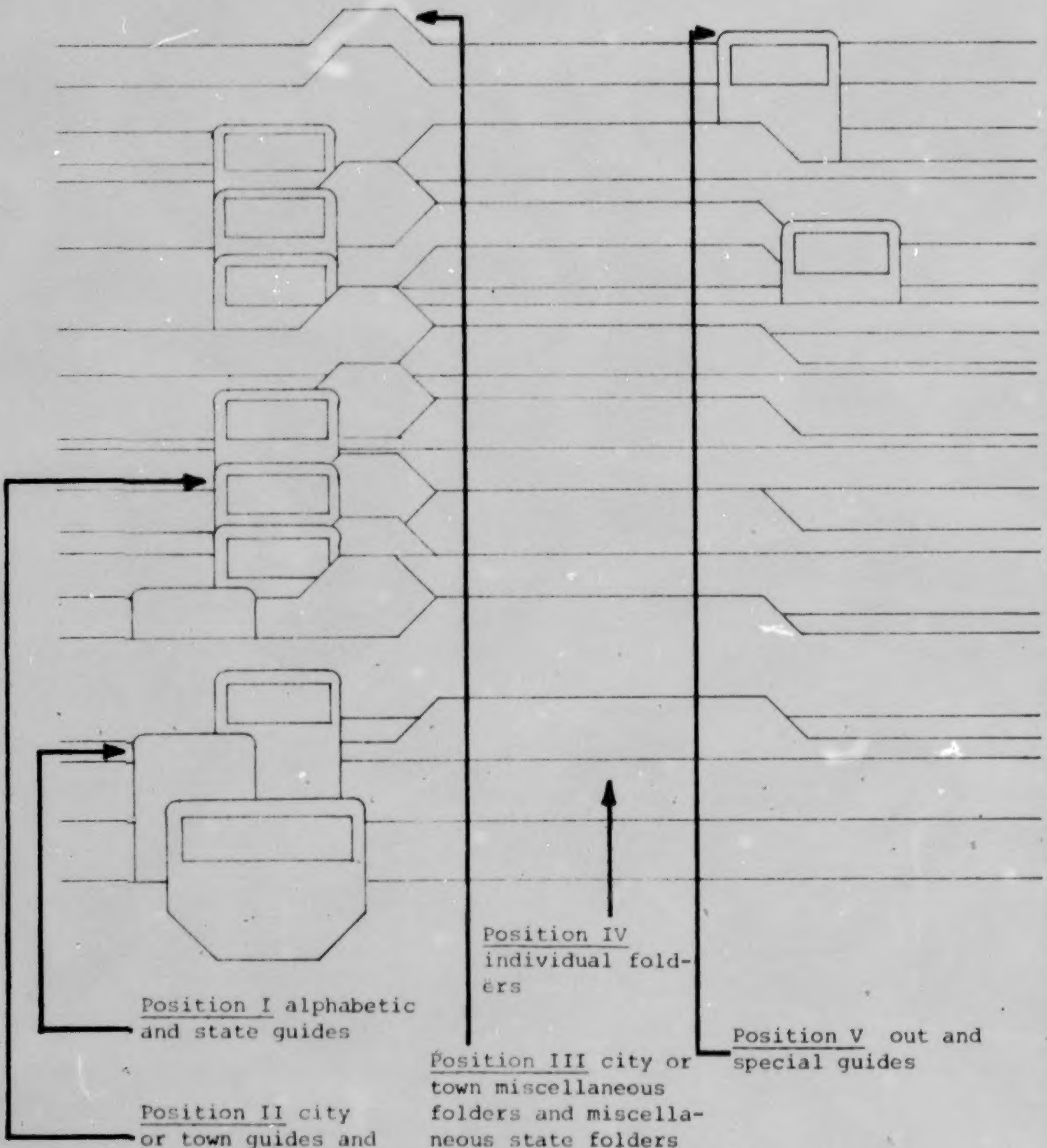
F. Charge-out

1. OUT indicator put in file in place of folder

2. Collect out-guide information--what was taken, who took it, when it was taken, and when it will be returned.

G. Follow-up - system used to make sure that papers are returned to file

GEOGRAPHIC ARRANGEMENT OF GUIDES AND FOLDERS



Position I alphabetic and state guides

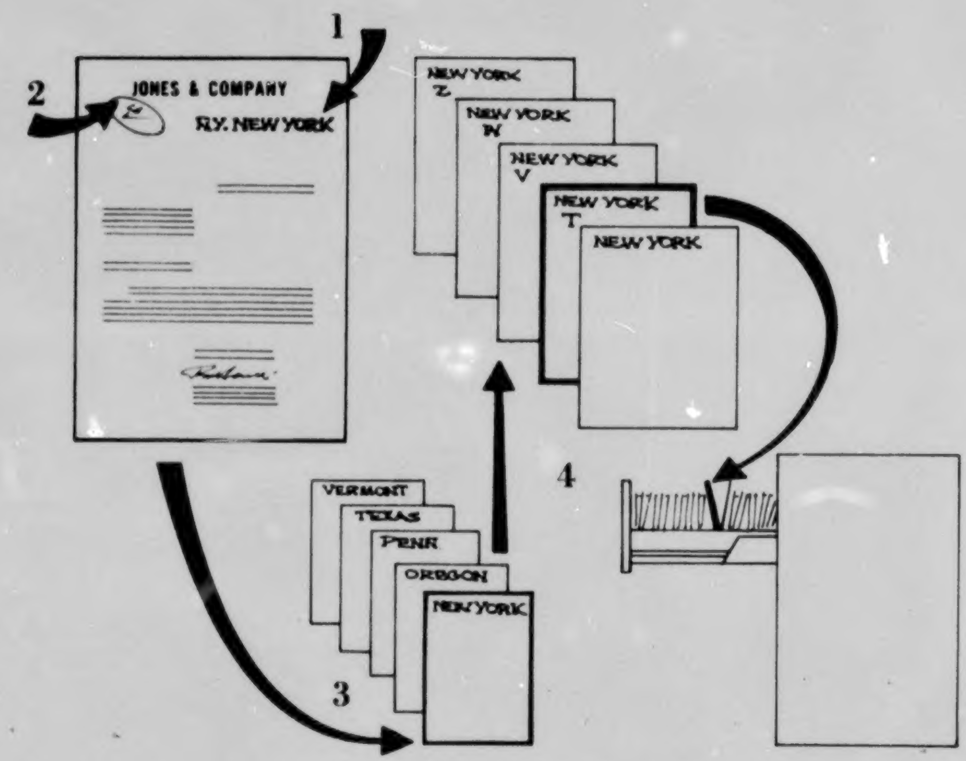
Position II city or town guides and some alphabetic subdivisions

Position III city or town miscellaneous folders and miscellaneous state folders

Position IV individual folders

Position V out and special guides

STEPS IN GEOGRAPHIC FILING OF CORRESPONDENCE



1. Inspecting. Correspondence is checked to make sure it has been released for filing.

2. Indexing and Coding. The name of the correspondent and location under which the record is to be filed are determined. Some file workers underline the name and encircle the location. Names for cross-referencing should be selected and coded also.

3. Sorting. Records are sorted first by main geographic division.

   Then these main units are sorted into geographic subdivisions.

4. Storing. The state and city or town guides are used to locate the proper folder section rapidly. The appropriate alphabetic part of the folder section is then scanned for an individual folder for the coded name. If there is none, the record is placed in a miscellaneous folder.

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UNIT IX

FILING MATERIALS GEOGRAPHICALLY

ASSIGNMENT SHEET #1--DETERMINING DIVISIONS

Directions: Read the following case situation and respond to the questions asked.

Brown and Root, Inc. is a large paper mill which has branches across the southern states. Correspondence comes in daily from the branches and has, up until now, been filed in a basic alphabetic filing system. The main office supervisor feels that some type of grouping and summarization of branch correspondence is needed.

Consider the information you have been given. 1. What are the three factors to consider in determining divisions? 2. What might be possible divisions? 3. Would a card index be used? Why or why not?

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UNIT IX

FILING MATERIALS GEOGRAPHICALLY

ASSIGNMENT SHEET #2--GEOGRAPHIC FILING PROCEDURE

Directions: Discuss how geographic filing is different from other methods in its filing procedure.

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UNIT IX

FILING MATERIALS GEOGRAPHICALLY

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

1. a. Type of business - large paper mill
   b. Geographic area of correspondence - southern states
   c. Way files are to be used - grouping and summarization of branch correspondence
2. a. State names - primary guide
   b. City names - secondary guide
   c. Branch names - individual folder
3. Yes, there is always the possibility of the geographic location of a branch being forgotten.

Assignment Sheet #2

Geographic filing is different from other methods of filing in its filing procedure. Though inspection is the same, coding is done first by the location and then by the alphabetic order of the name. After cross-referencing has been completed, sorting takes place. This also is done differently from other methods of filing in that it is sorted first by location and then by the alphabetic order of the name. Filing, charge-out, and follow-up are completed in the same manner as other methods of filing.

14.0302

UNIT IX

FILING MATERIALS GEOGRAPHICALLY

UNIT TEST

1. List the advantages and disadvantages in geographic filing.

2. a. If a business has branches throughout the U.S., what would you consider to be the primary guide? ________ ________________

   b. If a business has branches throughout one state only, what would you consider to be the primary guide? ________________

   c. Would a business that has salesmen use a geographic file? Why? ____

   ____

   ____

4. Discuss the use of the card index in geographic filing.

5. List the types of cross-referencing in geographic filing.

   a.

   b.

   c.

6. Explain the geographic filing procedure, using pictures.

7. Demonstrate the ability to:

   a. Determine filing divisions of a geographic file.

   b. Differentiate between geographic filing and other methods of filing.

   (NOTE: If this skill has not been accomplished prior to the test, ask the instructor when it should be completed.)

14.0302

UNIT IX

FILING MATERIALS GEOGRAPHICALLY

ANSWERS TO TEST

1. Advantages

   a. Direct filing and reference for geographic area

   b. Provision for miscellaneous records

   c. Records grouped by location

   Disadvantages

   a. Location as well as name required

   b. Triple sorting necessary

   c. Increased labor costs

   d. Increased possibility of error

   e. Reference to card index necessary

   f. Detailed, typed descriptions on folder labels

   g. Confusion in miscellaneous files

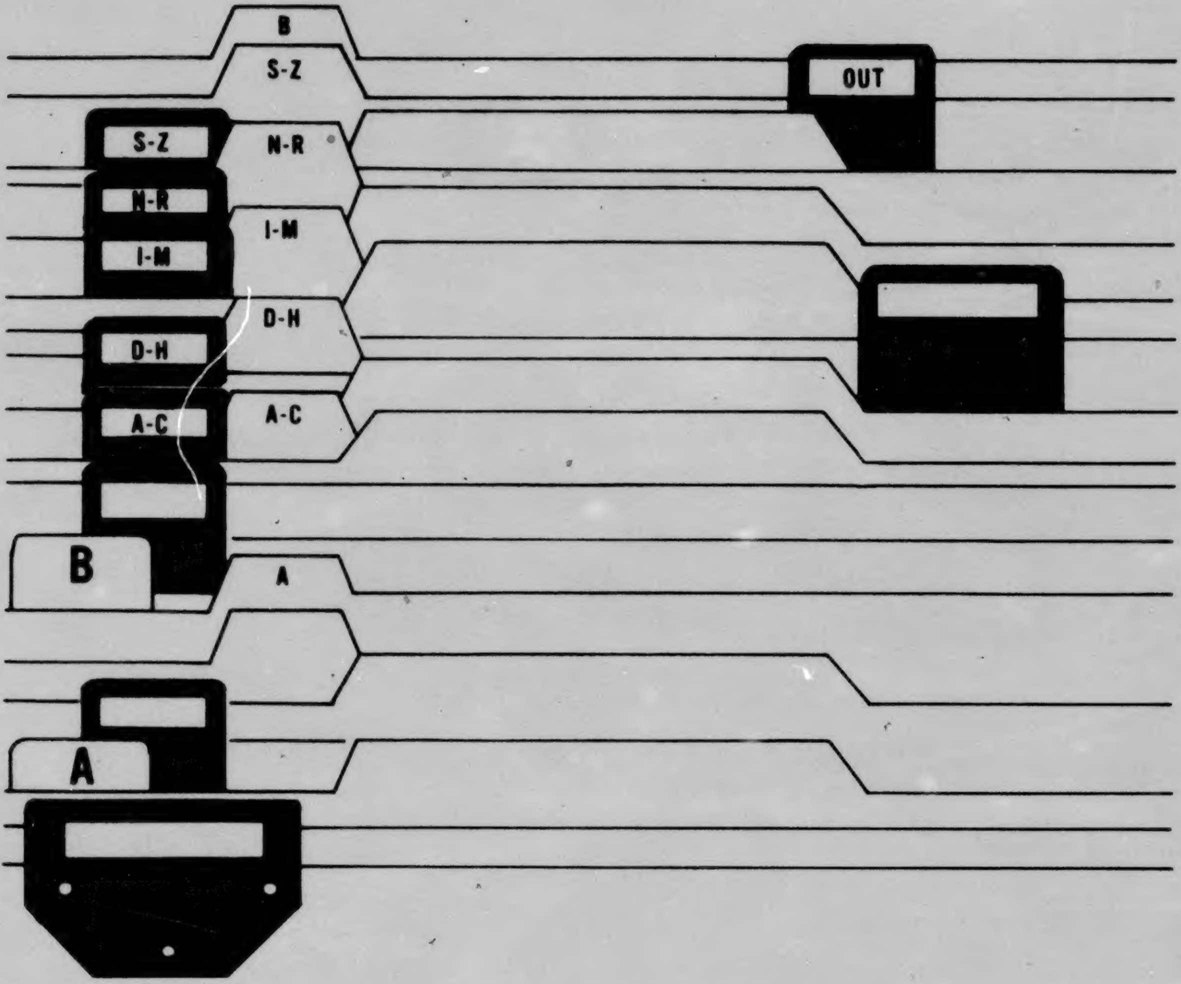
2. Fill in blank:

   a. States

   b. Cities

   c. Yes. Salesmen are usually assigned to certain geographic areas. Therefore, it is easy to file by these areas instead of trying to remember every salesman's name.

3.



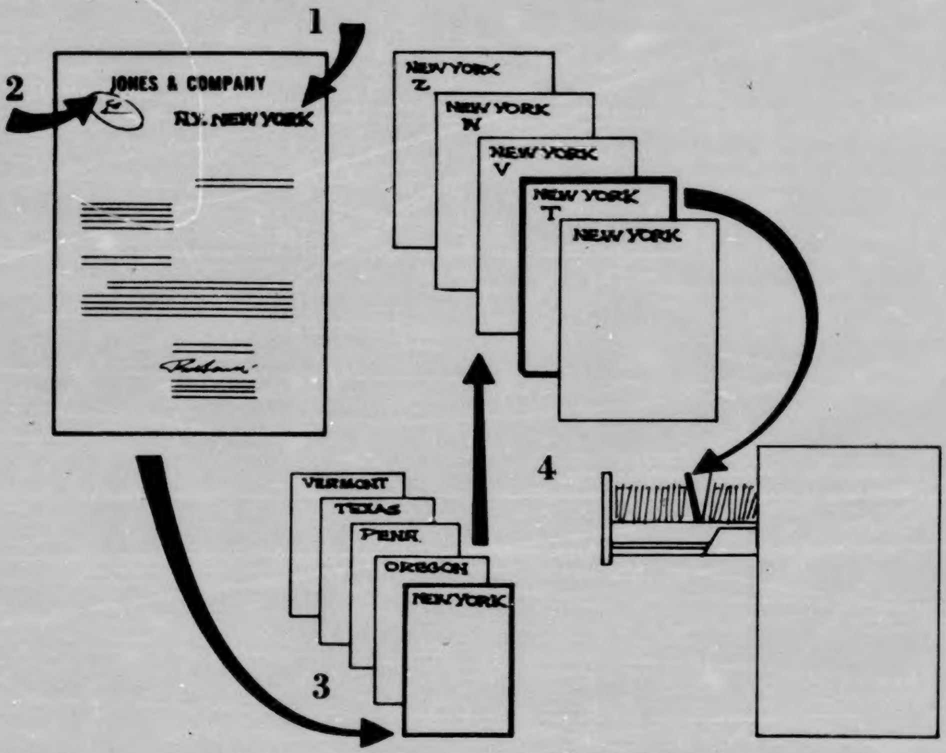
4. The card index is always filed alphabetically by names of correspondents. When a geographic location cannot be remembered, reference to the name of the correspondent in the card index will tell the geographic location.

5. a. Not likely to occur again - use cross-reference sheet

   b. Permanent - use manila tabbed cross-reference

   c. Individual to location - use card index

6.



7. Evaluated to the satisfaction of [illegible]e instructor.

14.0303

UNIT X

COMPUTING ROUTINE MATH TRANSACTIONS

TERMINAL OBJECTIVE

After completing this unit, the student will be able to add, subtract, multiply, and divide whole numbers, numbers containing decimals, and fractional numbers. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student will be able to:

1. Match the terms with their definitions.
2. Identify true statements pertaining to adding, subtracting, multiplying, and dividing whole numbers.
3. List the rules on adding, subtracting, multiplying, and dividing numbers containing decimals.
4. Complete the rules pertaining to adding, subtracting, multiplying, and dividing fractional numbers.
5. List the practical shortcut methods in addition, subtraction, multiplication, and division.
6. Cite the formulas for the three types of percentage problems.
7. Explain how to round off numbers.
8. Demonstrate the ability to:
   a. Add, subtract, multiply, and divide whole numbers, numbers containing decimals, fractions, and percentages.
   b. Apply practical shortcuts in addition, subtraction, multiplication, and division.
   c. Compute percentage.
   d. Round off numbers.

14.0303

UNIT X

COMPUTING ROUTINE MATH TRANSACTIONS

SUGGESTED ACTIVITIES

I. Instructor:

- A. Give students pretest supplied by teacher.
- B. Provide objective sheet.
- C. Discuss objective sheet.
- D. Provide information sheet.
- E. Discuss information sheet.
- F. Discuss and demonstrate proper procedure for computing:
  - a. whole numbers
  - b. decimals and fractions
  - c. decimals and equivalents
  - d. percents and percentages
  - e. rounding off numbers
- G. Provide assignment sheets.
- H. Discuss assignment sheets.
- I. Give post test and evaluate results.

II. Student:

- A. Complete pretest.
- B. Read objective sheet.
- C. Participate in discussion of objective sheet.
- D. Read information sheet.
- E. Participate in discussion of information sheet.

F. Participate in discussion and demonstration of proper procedure for computing:

   a. whole numbers

   b. decimals and fractions

   c. decimals and equivalents

   d. percents and percentages

   e. rounding off numbers

G. Read assignment sheets.

H. Complete assignment sheets.

I. Complete post test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objectives

   B. Information sheet

   C. Assignment sheets

      1. Assignment Sheet #1--Routine Math Processes Using Whole Numbers

      2. Assignment Sheet #2--Routine Math Processes Using Numbers Containing Decimals

      3. Assignment Sheet #3--Routine Math Processes Relating to Numbers Containing Fractions

      4. Assignment Sheet #4--Mathematical Shortcuts

      5. Assignment Sheet #5--Computing Percents and Percentages

      6. Assignment Sheet #6--Exercise in Rounding Off Numbers

   D. Answers to assignment sheets

   E. Test

   F. Answers to test

II. References:

A. Gossage, Loyce C. and Milton Briggs. Mathematics Skill Builder. 3rd ed. Cincinnati, Ohio: South-Western Publishing Co., 1969.

B. Huffman, Harry. Programmed Business Mathematics. 3rd ed. New York, New York: McGraw-Hill Book Company, 1976.

C. Martinka, Marie. Vocational Math for Business. Cincinnati, Ohio: South-Western Publishing Co., 1972.

D. Rosenberg, Robert. Business Math / 30. 2nd ed. New York, New York: McGraw-Hill Book Company, 1976.

14.0303

UNIT X

COMPUTING ROUTINE MATH TRANSACTIONS

INFORMATION SHEET

I. Terms and definitions

A. Addend--Numbers that are added together

B. Sum or total--Answer that is obtained in adding

C. Minuend--Top number in a subtraction problem.

D. Subtrahend--Bottom number in a subtraction problem

E. Difference or remainder--Answer in a subtraction problem

F. Multiplicand--Top or first number in a multiplication problem

G. Multiplier--Bottom or second number in a multiplication problem

H. Product--Result or answer of a multiplication problem

I. Dividend--Number to be divided

J. Divisor--Number that does the dividing

K. Quotient--Result obtained by dividing

L. Mixed numbers--Numbers composed of whole numbers and fraction such as 2 1/2

M. Improper fractions--Numerator is as large or larger than the denominator

N. Fraction--Part of a whole number

O. Numerator--Top number of a fraction

P. Denominator--Bottom number of a fraction

Q. Complex fraction--A fraction that has a fraction or a mixed number for its numerator or denominator or both, such as $\frac{5\ 1/4}{6}$

R. Percent--Expresses a fractional or decimal part of 100 and is a rate

S. Percentage--Expresses a part of a whole number in relation to 100 and is a quantity

T. Second--Unit of time

U. Mole--Unit for the amount of substance

V. Addition--The operation of combining numbers so as to obtain an equivalent simple total

W. Subtraction--The operation of deducting one number from another number to obtain a remainder

X. Multiplication--The abbreviated process of adding a number to itself a specified number of times

Y. Division--The process of distribution of one number among another number

II. Whole numbers

A. The place in which a figure appears in a whole number determines its value.

Example: 5768

Thousands (1000)	Hundreds (100)	Tens (10)	Ones (1)
5	7	6	8

B. Addition of whole numbers - combining whole numbers so as to get one equivalent total

Examples:

$$\begin{array}{r} 4 \\ +5 \\ \hline 9 \end{array} \qquad \begin{array}{r} 10 \\ +15 \\ \hline 25 \end{array} \qquad \begin{array}{r} 117 \\ +239 \\ \hline 356 \end{array}$$

C. Subtraction of whole numbers - deducting a whole number from another whole number

Examples:

$$\begin{array}{r} 5 \\ -\ 4 \\ \hline 1 \end{array} \qquad \begin{array}{r} 15 \\ -\ 10 \\ \hline 5 \end{array} \qquad \begin{array}{r} 239 \\ -\ 117 \\ \hline 122 \end{array}$$

D. Multiplication of whole numbers - process of adding a whole number to itself a specified number of times

Examples:

$$\begin{array}{r} 5 \\ \times\ 4 \\ \hline 20 \end{array} \qquad \begin{array}{r} 15 \\ \times\ 10 \\ \hline 150 \end{array} \qquad \begin{array}{r} 239 \\ \times\ 117 \\ \hline 1673 \\ 239 \\ 239 \\ \hline 27963 \end{array}$$

E. Division of whole numbers - distribution of one whole number among another whole number

Examples:

$$\begin{array}{r} 1 \\ 5\overline{)5} \\ \underline{5} \end{array} \qquad \begin{array}{r} 2 \\ 10\overline{)20} \\ \underline{20} \end{array} \qquad \begin{array}{r} 3 \\ 100\overline{)300} \\ \underline{300} \end{array}$$

III. Numbers containing decimals

A. Keep each digit in its own column using the decimal as a guide.

Example: $1534.21

Thousands	Hundreds	Tens	Ones		Tenths	Hundredths
(1000)	(100)	(10)	(1)		(1/10)	(1/100)
1	5	3	4	.	2	1

B. Addition of numbers with decimals - combining numbers containing decimals so as to get one equivalent total

Examples:

$$\begin{array}{r} 5.5 \\ +\ 4.1 \\ \hline 9.6 \end{array} \qquad \begin{array}{r} 10.7 \\ +\ 11.1 \\ \hline 21.8 \end{array} \qquad \begin{array}{r} 191.1 \\ +\ 311.1 \\ \hline 502.2 \end{array}$$

C. Subtraction of numbers with decimals - add additional zeros for subtraction of decimals if necessary.

Examples:

$$\begin{array}{r} 4.5 \\ -\ 3.20 \\ \hline \end{array} = \begin{array}{r} 4.50 \\ -\ 3.20 \\ \hline 1.30 \end{array} \qquad \begin{array}{r} 4.9 \\ -\ 3.75 \\ \hline \end{array} = \begin{array}{r} 4.90 \\ -\ 3.75 \\ \hline 1.15 \end{array}$$

$$\begin{array}{r} 6. \\ -\ 3.1 \\ \hline \end{array} = \begin{array}{r} 6.0 \\ -\ 3.1 \\ \hline 2.9 \end{array}$$

D. Multiplication of numbers with decimals - the product will contain the number of decimal places that are found in adding the decimals in both the multiplier and multiplicand.

Examples:

$$\begin{array}{r} 4.5 \\ \times\ 2.3 \\ \hline 13\ 5 \\ 90 \\ \hline 10.35 \end{array} \qquad \begin{array}{r} 1.04 \\ \times\ .2 \\ \hline .208 \end{array} \qquad \begin{array}{r} .004 \\ \times\ .75 \\ \hline 20 \\ 28 \\ \hline .00300 \end{array}$$

E. Division of numbers with decimals

1. Move the decimal point in the divisor enough places to the right to make it a whole number.

2. Move the decimal point in the dividend the same number of places, adding zeros if necessary.

3. Place the decimal point for the quotient directly above the new position of the decimal point in the dividend.

Examples: 125.25 ÷ .25 6.9 ÷ .03

```
          501.            230.
     /25.)125/25.    /03.)6/90.
          125             6
          ---             -
             25             9
             25             9
             --             -
                              0
                              0
                              -
```

IV. Fractional numbers

A. Addition and subtraction of common fractions

1. Only things of like denomination should be added or subtracted.

2. If different, must be changed to equivalent fraction with a common denominator

   a. To change a fraction to its equivalent in a higher denomination, multiply the denominator of the given fraction by the number that will give the desired denominator.

   b. Multiply the numerator of the fraction by the same multiplier.

   Example: 1/2 to fourths

   step a. 2 x 2 = 4

   step b. 1 x 2 = 2

   Result: 1/2 = 2/4

   c. To change a fraction to its equivalent in a lower denomination, proceed in like manner, but divide, instead of multiplying, both the denominator and the numerator by the same number.

   Example: 2/4 to halves

   step c. 4 ÷ 2 = 2

   2 ÷ 2 = 1

   Result: 2/4 = 1/2

B. Addition and subtraction of mixed numbers and improper fractions

1. Common denominators are still necessary when adding and subtracting mixed numbers and improper fractions.

2. Mixed numbers must be changed to improper fractions.

    a. To change a mixed number to an improper fraction, multiply the whole number part of the mixed number by the denominator of the fractional part, and to this result add the numerator of the fractional part. This number is the numerator of the improper fraction.

    b. To change an improper fraction to a mixed number, divide the numerator by the denominator.

Examples: step a. 1 2/6

1 x 6 = 6

6 + 2 = 8

Result: 8/6

step b. 7/5

$$\begin{array}{r} 1 \\ 5\overline{)7} \\ \underline{5} \\ 2 \end{array}$$

Result: 1 2/5

3. When mixed numbers are to be added, add the fractional parts of the addends and to this sum add the whole number portions of the addends.

Example:

$$\begin{array}{r} 1\ 1/2 \\ +\ 2\ 2/8 \\ \hline 3\ 6/8 \end{array} \text{ or } 3\ 3/4 \qquad 1/2 = 4/8 + 2/8 = 6/8$$

4. When mixed numbers are to be subtracted

    a. Change each mixed number to an improper fraction.

    b. Convert the improper fractions to equivalent fractions with common denominators.

    c. Subtract the numerators.

d. Place the difference over the common denominator and reduce to lowest terms or a mixed number.

Example:
```
  5 7/8     step a.  47/8 - 19/4
 -4 3/4
 ------     step b.  47/8 - 38/8

            step c.  47 - 38 = 9

            step d.  9/8 or 1 1/8
```

C. Multiplication of fractions

1. To multiply common fractions, multiply the numerators by the numerators and the denominators by the denominators and reduce the product to its lowest terms.

   Example: 3/5 x 1/3 = 3/15 = 1/5

2. To multiply a whole number by a fraction, simply multiply the whole number by the numerator and divide by the denominator.

   Example:
```
     7 x 1/6

     7 x 1 = 7

       1 1/6
      ------
    6)7
      6
      -
      1
```

3. When multiplying a whole number by a mixed number, multiply first by the fraction and then by the whole number.

   Example:
```
     47
   x 23 1/3
   --------
     15 2/3  (47 x 1/3)
    141
    94
   --------
   1096 2/3
```

4. To multiply a mixed number by a whole, multiply first by the fraction of the multiplier and then multiply the whole numbers.

   Example:
```
     124 1/8
    x 35
    --------
       4 3/8  (35 x 1/8)
     620
    372
    --------
    4344 3/8
```

5. The multiplication of a mixed number by a mixed number may be done in one of two ways:

   a. Convert the mixed numbers to improper fractions and multiply numerators and denominators and reduce results to lowest terms.

   b. Multiply separately the fraction and whole number in the multiplicand by the fraction and whole number in the multiplier.

```
Example:     35 1/4
           x  9 2/3
           --------
               2/12  (2/3 x 1/4)
             23 1/3  (2/3 x 35)
              2 1/4  (9 x 1/4)
            315      (9 x 35)
           --------
            340 3/4
```

D. Division of fractions

1. If either the divisor or the dividend is a fraction, invert the divisor and multiply the dividend by this new number.

   Example: 1/2 ÷ 1/3

   1/2 x 3/1 = 3/2 = 1 1/2

2. Change each mixed number to an improper fraction and then proceed as explained in #1 above.

V. Practical shortcuts

A. Develop speed in addition by adding groups of two or more numbers to equal 10.

```
Example:  6
          4  > 10
          3
          7  > 10      = 30
          2
          4  > 10
          4
          -
```

B. In multiplying by 10, 100, 1000, etc., move the decimal place in the multiplicand to the right as many places as there are zeros in the multiplier.

   Example: 25. x 10 = 250

   300. x 100 = 30000

C. To divide by 10, 100, 1000, etc., move the decimal point in the dividend as many places to the left as there are zeros in the divisor.

Example: 2500. ÷ 100 = 25.

25. ÷ 1000 = .025

D. Dividing by 25 or by a multiple of 25

1. To divide by 25, first divide by 100 and multiply results by 4 because dividing by 25 gives you a quotient 4 times larger than dividing by 100.

2. To divide by 50, first divide by 100 and multiply the results by 2.

3. To divide by 75, first divide by 100, then multiply the quotient by 4 and divide the result by 3.

Examples: step 1. 900 ÷ 100 = 9.00

9 x 4 = 36

step 2. 2310 ÷ 100 = 23.10

23.10 x 2 = 46.20

step 3. 589 ÷ 100 = 5.89

5.89 x 4 = 23.56

23.56 ÷ 3 = 7.853

VI. Percents and percentages

A. Utilized in depicting the relationship between two numbers

B. Three factors are involved in a percentage relationship:

1. Base--the number on which the percent is calculated or the whole amount

2. Rate--% or the number of hundreds taken

3. Percentage--the number found by multiplying the base by the rate

C. In working percentage problems, the % must be converted to a decimal fraction by removing the percent sign and moving the decimal point two places to the left.

90% = .90

1.5% = .015

In changing a decimal fraction to percent, move the decimal point two places to the right and add a % sign.

.90 = 90%

D. Three types of percentage problems

1. Finding a certain percent of a number--Percentage= Rate x Base

   Example: Find 15% of $5.00

   .15 x 5.00 = $.75

2. Finding what percent one number is of another-- $\text{Rate} = \frac{\text{Percentage}}{\text{Base}}$

   Example: 150 is what % of 1250?

   150 ÷ 1250 = .12 or 12%

3. Finding the whole number when a percent of it is known-- $\text{Base} = \frac{\text{Percentage}}{\text{Rate}}$

   Example: 105 is 15% of what number?

   105 ÷ .15 = 700

VII. Rounding off numbers

A. To round off any number to a specific place, select the desired place (as nearest thousand or nearest million) and omit all numerals to the right of that place substituting zeros.

B. The rule for rounding is: Raise the significant digit (the digit you are rounding) by 1 if the digit to the right of it is between five and nine and do not change it if the digit to the right of it is between 0 and 4.

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UNIT X

COMPUTING ROUTINE MATH TRANSACTIONS

ASSIGNMENT SHEET #1--ROUTINE MATH PROCESSES USING WHOLE NUMBERS

Directions: Complete the following problems relating to whole numbers.

I. Add:

1.	8	2.	12	3.	134	4.	1,200	5.	48	6.	168
	4		16		122		4,300		56		148
			13		346		5,198		39		263
									24		192
									52		631

7. 3 + 6 + 8 + 10 =

8. 58 + 64 + 32 + 40 =

II. Subtract:

1.	9	2.	87	3.	94	4.	312	5.	1,362	6.	632
	3		63		24		197		976		396

7. 48 - 26 =

8. 189 - 76 =

III. Multiply:

1. 36 x 5 =

2. 63 x 7 =

3. 96 x 12 =

4. 430 x 7 =

5. 364 x 28 =

6. 9,368 x 37 =

7. 8,674 x 8 =

8. 726 x 33 =

9.	86	10.	96
	x 6		x 12

IV. Divide:

1. $7\overline{)364}$ 2. $14\overline{)868}$ 3. $5\overline{)2,062}$ 4. $3\overline{)2,493}$

5. $8\overline{)1,638}$ 6. $134\overline{)12,362}$ 7. $27\overline{)24,368}$ 8. $6\overline{)8,346}$

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UNIT X

COMPUTING ROUTINE MATH TRANSACTIONS

ASSIGNMENT SHEET #2--ROUTINE MATH PROCESSES USING NUMBERS CONTAINING DECIMALS

Directions: Complete the following problems relating to numbers containing decimals.

I. Add:

1. 6.75
   3.86
2. 136.2
   31.8
3. 328.25
   18.06
   1.3
   6.0728
   148.381
4. 1.5 + 17.28 + 1.7 =
5. 18.50 + 3.75 + 2.8 =

II. Subtract:

1. 17.3693
   - 9.146
2. 38.1
   - 4.581
3. 28.036
   - .89326
4. 4.92 - 3.964 =
5. 125 - 29.368 =

III. Multiply:

1. 46.024
   x .017
2. .000284
   x .436
3. .00636
   x .00362
4. 48625
   x .009
5. 25.50
   x 1.75

IV. Divide:

1. $121\overline{)60.380}$ 2. $2.8\overline{)4,380.10}$ 3. $6.08\overline{)2,890}$

4. $.072\overline{)573.08}$ 5. $76\overline{)138.8}$

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UNIT X

COMPUTING ROUTINE MATH TRANSACTIONS

ASSIGNMENT SHEET #3--ROUTINE MATH PROCESSES RELATING TO NUMBERS CONTAINING FRACTIONS

Directions: Complete the following problems relating to numbers containing fractions.

I. Add:

1. 3/7 + 3/7 =

2. 1/2 + 1/4 + 5/6 =

3. 5 5/30 + 9 5/6 + 6 1/5 =

4. 8/3 + 1/6 + 17/12 =

5. 3/4 + 2/3 + 6/12 =

6. 2 1/4 + 3 3/8 =

7. 1/4 + 3/4 + 3/12 =

II. Subtract:

1. 5/12 - 1/12 =

2. 5/6 - 1/4 - 1/2 =

3. 3/4 - 1/2 - 1/12 =

4. 63 1/8
- 6 1/2

5. 76
- 43 1/4

6. 6 11/12
- 4 6/12

7. 12 12/16
- 5 6/8

III. Multiply:

1. 2/3 x 3/5 =
2. 6 1/4 x 3 3/4 =
3. 13 x 4 1/2 =
4. 8 x 1 3/4 =
5. 1/3 x 2/4 =
6. 7 3/8 x 13 1/2 =
7. 1/4 x 1/4 =
8. 2/3 x 7/8 x 2/5 =

IV. Divide:

1. 3/5 ÷ 8/16 =
2. 22 1/2 ÷ 1 1/2 =
3. 7 ÷ 1/3 =
4. 4 ÷ 2/3 =
5. 120 ÷ 6 1/2 =
6. 12 1/4 ÷ 2 1/4=
7. 5/12 ÷ 4 =

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UNIT X

COMPUTING ROUTINE MATH TRANSACTIONS

ASSIGNMENT SHEET #4--MATHEMATICAL SHORTCUTS

Directions: Complete the following problems relating to practical shortcuts.

I. Addition:

1.	9	2.	8	3.	7	4.	726	5.	164	6.	5,627
	1		2		3		195		532		4,251
							234		534		1,943
											3,426
											5,942

II. Multiply:

1. 385 x 10 =

2. 180 x 1,000 =

3. 83 x 8,000 =

4. 364 x 100 =

5. 38.65 x 100 =

6. 436 x 600 =

III. Divide: Carry answers (Add a decimal and 4 zeros to each dividend before dividing.)

1. 10)3,863

2. 1000)12,483

3. 18,290 ÷ 50 =

4. 100)5,783

5. 4,480 ÷ 25 =

6. 9,740 ÷ 75 =

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COMPUTING ROUTINE MATH TRANSACTIONS

ASSIGNMENT SHEET #5--COMPUTING PERCENTS AND PERCENTAGES

Directions: Find the base, rate, or percentage in the following problems. (When necessary, carry answers two decimal places.)

1. 40% of $4.50 is __________.
2. 38% of $175.75 is __________.
3. 50 is __________% of 320.
4. $55 is 35% of __________.
5. 12% of $188 is __________.
6. 3 is 15% of __________.
7. $255 is __________% of $1085.
8. 21.12 is 8% of __________.
9. 1160 is __________% of 1450.
10. 25% of $875 is __________.
11. 450 is 25% of __________.
12. 3960 is __________% of 2640.

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COMPUTING ROUTINE MATH TRANSACTIONS

ASSIGNMENT SHEET # 6--EXERCISE IN ROUNDING OFF NUMBERS

Directions: Complete the following problems relating to rounding numbers.

Round each number to the places indicated:

1. 236 to nearest ten

2. 23,280 to nearest hundred

3. 932,660 to nearest thousand

4. 106,858 to nearest ten thousand

5. 583 to nearest ten

6. 873 to nearest hundred

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UNIT X

COMPUTING ROUTINE MATH TRANSACTIONS

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

I. 1.	12	II. 1.	6	III. 1.	180	IV. 1.	52
2.	41	2.	24	2.	441	2.	62
3.	602	3.	70	3.	1,152	3.	412 2/5
4.	10,698	4.	115	4.	3,010	4.	831
5.	219	5.	386	5.	10,192	5.	204 3/4
6.	1,402	6.	236	6.	346,616	6.	92.25
7.	27	7.	22	7.	69,392	7.	902 14/27
8.	194	8.	113	8.	23,958	8.	1391
				9.	516		
				10.	1,152		

Assignment Sheet #2

I. 1.	10.61	II. 1.	8.2233	III. 1.	.782408
2.	168.0	2.	33.519	2.	.000123824
3.	502.0638	3.	27.14274	3.	.000023
4.	20.48	4.	.956	4.	437.625
5.	25.05	5.	95.632	5.	44.625
IV. 1.	.4990082				
2.	1564.3214				
3.	475.32894				
4.	7959.4444				
5.	1.8263157				

C

Assignment Sheet #3

I.	1.	6/7	II.	1.	1/3	III.	1.	2/5
	2.	1 7/12		2.	1/12		2.	23 7/16
	3.	21 1/5		3.	1/6		3.	58 1/2
	4.	4 1/4		4.	56 5/8		4.	14
	5.	1 11/12		5.	32 3/4		5.	1/6
	6.	5 5/8		6.	2 5/12		6.	99 9/16
	7.	1 1/4		7.	7		7.	1/16
							8.	7/30

IV.	1.	1 1/5
	2.	15
	3.	21
	4.	6
	5.	18 6/13
	6.	5 4/9
	7.	5/48

Assignment Sheet #4

I.	1.	10	II.	1.	3,850	III.	1.	386.3
	2.	10		2.	180,000		2.	12.483
	3.	10		3.	664,000		3.	365.8
	4.	1155		4.	36,400		4.	57.83
	5.	1230		5.	3865.		5.	179.2
	6.	21189		6.	261,600		6.	129.8667

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UNIT X

COMPUTING ROUTINE MATH TRANSACTIONS

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #5

1. $1.80
2. $66.79
3. 15.63%
4. $157.14
5. $22.56
6. 20
7. 23.5%
8. 264
9. 80%
10. $218.75
11. 1800
12. 150%

Assignment Sheet #6

1. 24
2. 233
3. 933,000
4. 110,000
5. 58
6. 900

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UNIT X

COMPUTING ROUTINE MATH TRANSACTIONS

UNIT TEST

1. Match terms on the right to the correct definition.

_____ 1. The abbreviated process of adding a number to itself a specified number of times

_____ 2. Numbers composed of whole numbers and fractions

_____ 3. Result obtained by dividing

_____ 4. Number that does the dividing

_____ 5. Unit for the amount of substance

_____ 6. The operation of deducting one number from another number to obtain a remainder

_____ 7. Number to be divided

_____ 8. Result or answer of a multiplication problem

_____ 9. Unit of time

_____ 10. The process of distribution of one number among another number

_____ 11. A quantity that expresses a part of a whole number in relation to 100

_____ 12. Bottom or second number in a multiplication problem

a. subtrahend
b. mixed numbers
c. complex fraction
d. multiplicand
e. percent
f. dividend
g. percentage
h. sum or total
i. numerator
j. divisor
k. addend
l. second
m. quotient
n. subtraction
o. fraction
p. minuend
q. multiplication
r. product
s. division
t. difference or remainder
u. addition

_____13. The operation of combining numbers so as to obtain an equivalent simple total

_____14. A rate that expresses a fractional or decimal part of 100

_____15. Top or first number in a multiplication problem

_____16. A fraction that has a fraction or a mixed number for its numerator or denominator or both

_____17. Answer in a subtraction problem

_____18. Bottom number of a fraction

_____19. Bottom number in a subtraction problem

_____20. Top number of a fraction

_____21. Top number in a subtraction problem

_____22. Part of a whole number

_____23. Answer that is obtained in adding

_____24. Number in which numerator is as large or larger than the denominator

_____25. Numbers that are added together

v. improper fraction

w. mole

x. denominator

y. multiplier

2. Identify true statements pertaining to adding, subtracting, multiplying, and dividing whole numbers by circling "T" or "F".

T F a. Subtraction is the distribution of one whole number among another whole number.

T F b. Multiplication of whole numbers is a process of adding.

T F c. Adding whole numbers yields one equivalent sum.

T F d. Division of whole numbers deducts one whole number from another whole number.

T F e. The position of a figure in a whole number denotes that number's value.

3. List the rules on adding, subtracting, multiplying, and dividing numbers containing decimals.

4. Complete the following statements on rules for fractional numbers by filling in the blanks.

When adding or subtracting common fractions, only things of _______ denomination should be added or subtracted. If different, it must be changed to an equivalent fraction with a _________ denominator. To change a fraction to its equivalent in a higher denomination, __________ the denominator of the given fraction by the number that will give the desired denominator. Multiply the ____________ of the fraction by the same multiplier. To change a fraction to its equivalent in a lower denomination, proceed in like manner, but _______, instead of multiplying, both the denominator and the numerator by the same number.

When adding and subtracting mixed numbers and improper fractions, common denominators are _______ ____________.. Mixed numbers must be changed to ____________ fractions. To change a mixed number to an improper fraction, multiply ________________________ of the mixed number by the denominator of the fractional part, and to this result add the __________________________________. This number is the numerator of the improper fraction. To change an improper fraction to a mixed number, _________ the numerator by the denominator. When mixed numbers are to be added, ________ _________________________________ and to this sum _________ _____________________________________. When mixed numbers are to be subtracted: change each ________________ to an ____________________; convert the ___________________ to ______________________________ with common denominators; __________ the numerators; and place the difference over the common denominator and reduce to _________ terms or a ____________________.

When multiplying common fractions, ______________________ ____ ____. When multiplying a whole number by a fraction, simply ______________________ ____.

When multiplying a whole number by a mixed number, multiply first by the ___________ and then by the __________________. To multiply a mixed number by a whole, multiply first by the ______________ of the multiplier and then multiply the ______________________________.

The multiplication of a mixed number by a mixed number may be done in one of two ways: _________ the mixed numbers to improper fractions and ______________ numerators and denominators and ___________ results to lowest terms; or multiply separately the fraction and whole number in the multiplicand by the fraction and whole number in the multiplier. When dividing fractions, if either the divisor or the dividend is a fraction, ____ ______________________________________. When dealing with a mixed number, change it to a(n) ______________ fraction and then _____________ the divisor and ____________ the dividend by this reciprocal.

5. List the practical shortcut methods in addition, subtraction, multiplication, and division.

6. Cite the formulas for the three types of percentage problems.

   a.

   b.

   c.

7. Explain how to round off numbers.

8. Demonstrate the ability to:

   a. Add, subtract, multiply, and divide whole numbers, numbers containing decimals, fractions, and percentages.

   b. Use practical shortcuts in addition, subtraction, multiplication, and division.

   c. Compute percentage.

   d. Round off numbers.

   (NOTE: If the skills have not been accomplished prior to the test, ask the instructor when they should be completed.)

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UNIT X

COMPUTING ROUTINE MATH TRANSACTIONS

ANSWERS TO UNIT TEST

1. q 1.
b 2.
m 3.
j 4.
w 5.
n 6.
f 7.
r 8.
l 9.
s 10.
g 11.
y 12.
u 13.
e 14.
d 15.
c 16.
t 17.
x 18.
a 19.
i 20.
p 21.
o 22.

__h__ 23.

__v__ 24.

__k__ 25.

2. a. F

   b. T

   c. T

   d. F

   e. T

3. a) Keep each digit in its own column using the decimal as a guide.

   b) Addition of numbers with decimals is the combining of numbers containing decimals so as to get one equivalent total.

   c) Subtraction of numbers with decimals--Additional zeros must be added where necessary to keep the decimals in line with each other.

   d) Multiplication of numbers with decimals--The product will contain the number of decimal places that are found in adding the decimals in both the multiplier and the multiplicand.

   e) Division of numbers with decimals--Move the decimal point in the divisor enough places to the right to make it a whole number. Move the decimal point in the dividend the same number of places, adding zeros if necessary. Place the decimal point for the quotient directly above the new position of the decimal point in the dividend.

4. When adding or subtracting common fractions, only things of like denomination should be added or subtracted. If different, it must be changed to an equivalent fraction with a common denominator. To change a fraction to its equivalent in a higher denomination, multiply the denominator of the given fraction by the number that will give the desired denominator. Multiply the numerator of the fraction by the same multiplier. To change a fraction to its equivalent in a lower denomination, proceed in like manner, but divide, instead of multiplying, both the denominator and the numerator by the same number.

   When adding and subtracting mixed numbers and improper fractions, common denominators are still necessary.

Mixed numbers must be changed to improper fractions. To change a mixed number to an improper fraction, multiply the whole number part of the mixed number by the denominator of the fractional part, and to this result add the numerator of the fractional part. This number is the numerator of the improper fraction. To change an improper fraction to a mixed number, divide the numerator by the denominator. When mixed numbers are to be added, add the fractional parts of the addends and to this sum add the whole number portions of the addends. When mixed numbers are to be subtracted: change each mixed number to an improper fraction; convert the improper fractions to equivalent fractions with common denominators; subtract the numerators; and place the difference over the common denominator and reduce to lowest terms or a mixed number.

When multiplying common fractions, multiply the numerators by the numerators and denominators by the denominators and reduce the product to its lowest terms. When multiplying a whole number by a fraction, simply multiply the whole number by the numerator and divide by the denominator. When multiplying a whole number by a mixed number, multiply first by the fraction and then by the whole number. To multiply a mixed number by a whole, multiply first by the fraction of the multiplier and then multiply the whole numbers.

The multiplication of a mixed number by a mixed number may be done in one of two ways: convert the mixed numbers to improper fractions and multiply numerators and denominators and reduce results to lowest terms; or multiply separately the fraction and whole number in the multiplicand by the fraction and whole number in the multiplier.

When dividing fractions, if either the divisor or the dividend is a fraction, invert the divisor and multiply the dividend by this reciprocal. When dealing with a mixed number, change it to an improper fraction and then invert the divisor and multiply the dividend by this reciprocal.

5. a) Develop speed in addition by adding groups of two or more numbers to equal ten.

   b) In multiplying by 10, 100, 1000, etc., move the decimal place in the multiplicand to the right as many places as there are zeros in the multiplier.

   c) To divide by 10, 100, 1000, etc., move the decimal point in the dividend as many places to the left as there are zeros in the divisor.

   d) Dividing by 25 or by a multiple of 25:

   To divide by 25, first divide by 100 and multiply the results by 4.

To divide by 50, first divide by 100 and then multiply the results by 2.

To divide by 75, first divide by 100, then multiply the quotient by 4 and divide the result by 3.

6. The formulas for working the three types of percentage problems are:

   a. Percentage = Rate x Base

   b. $\text{Rate} = \dfrac{\text{Percentage}}{\text{Base}}$

   c. $\text{Base} = \dfrac{\text{Percentage}}{\text{Rate}}$

7. To round off any number to a specific place, select the desired place (as nearest thousand or nearest million) and omit all numerals to the right of that place substituting zeros. The rule of rounding is: Raise the significant digit (the digit you are rounding) by 1 if the digit to the right of it is between 5 and 9 and do not change it if the digit to the right of it is between 0 and 4.

8. Evaluated to the satisfaction of the instructor.

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UNIT XI

OPERATING THE 10-KEY ADDING MACHINE

TERMINAL OBJECTIVE

After completing this unit, the student will be able to demonstrate the ability to operate the 10-Key adding machine with speed and accuracy using the touch system to compute simple to complex mathematical problems. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit, the student will be able to:

1. Define terms associated with 10-Key adding machine.
2. Match the names of the major keys of the 10-Key adding machine with their identifying descriptions.
3. Write a brief paragraph citing the posture and operational procedure used in the touch method.
4. List in sequential order the procedures involved in operating an electric 10-Key adding machine.
5. Cite the procedure used in clearing the machine.
6. List the steps involved in adding on the 10-Key.
7. Write a paragraph citing the procedure used in finding sub-totals, numbering problems using the non-add key, and using the repeat key.
8. Cite the use of the subtraction key in subtracting numbers from a list of figures, in correcting errors, and in converting credit balances.
9. Place in sequential order the steps involved in solving a multiplication problem.
10. Demonstrate the ability to:
    a. Add by touch method.
    b. Use the sub-total, non-add, and repeat keys.

c. Use the subtract key.

d. Use the repeat key to multiply.

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UNIT XI

OPERATING THE 10-KEY ADDING MACHINE

SUGGESTED ACTIVITIES

I. Instructor:

   A. Provide objective sheet.

   B. Discuss objective sheet.

   C. Provide information sheet.

   D. Discuss information sheet.

   E. Discuss parts of 10-Key machine.

   F. Discuss and demonstrate touch method.

   G. Discuss and demonstrate the techniques of changing an adding machine tape.

   H. Show transparencies.

   I. Provide job sheets.

   J. Discuss job sheets.

   K. Give test and evaluate results.

II. Student:

   A. Read objective sheet.

   B. Participate in discussion of objective sheet.

   C. Read information sheet.

   D. Participate in discussion of information sheet.

   E. Participate in discussion of parts of 10-Key machine.

   F. Participate in discussion and demonstration of touch method.

   G. Participate in discussion and demonstration of changing an adding machine tape.

   H. View transparencies.

- I. Read job sheets.
- J. Complete job sheets.
- K. Take test.

INSTRUCTIONAL MATERIALS

- I. Included in this unit:
  - A. Objectives
  - B. Information sheet
  - C. Transparency masters
    - 1. XI-TM-1--The 10-Key Adding Machine
    - 2. XI-TM-2--Home Key Position
    - 3. XI-TM-3--Mechanical Printing Calculator
  - D. Job sheets
    - 1. Job Sheet #1--Adding By Touch
    - 2. Job Sheet #2--Using the Sub-Total, Non-Add and Repeat Keys
    - 3. Job Sheet #3--Using the Subtraction Key
    - 4. Job Sheet #4--Learning to Multiply
  - E. Answers to job sheets
  - F. Test
  - G. Answers to test
- II. References:

  - A. Cornelia, Nicholas J. and others. Office Machines Course. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1971.
  - B. Dool, J. H. Business Machine Exercises. New York, New York: Gregg Division, McGraw-Hill Book Company, 1964.
  - C. Fasnacht, Harold E. and others. How to Use Business Machines. 3rd ed. New York, New York: Gregg Division, McGraw-Hill Book Company, 1969.

D. Pasewark, William and others. Ten-Key Adding Listing Machine Course. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

E. Walker, Arthur L. and others. How to Use Adding and Calculating Machines. 3rd ed. New York, New York: Gregg Division, McGraw-Hill Book Company, 1967.

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UNIT XI

OPERATING THE 10-KEY ADDING MACHINE

INFORMATION SHEET

I. Terms and definitions

- A. 10-Key Machine--Machine which contains one numeric entry key for each of the digits 1-9, plus the 0, along with the usual operation keys
- B. Listing--Each calculation is printed on a paper tape.
- C. Index a Number--Used in entering a number on the keyboard
- D. Home Position--The starting position from which the fingers move to strike all the other keys; index finger on the 4 key, middle finger on the 5 key, ring finger on the 6 key
- E. Touch System--Learning use of key by touch rather than by sight

II. The major keys of a 10-Key adding machine

- A. Add key--Identified by plus symbol, used to index numbers to be added
- B. Subtract key--Identified by minus symbol, used to index numbers to be subtracted
- C. Repeat key--Identified by "X" symbol, used to set up machine to perform multiplication process
- D. Subtotal key--Identified by "S" symbol, used to supply partial total as needed; will print the amount that has been accumulated but will not clear the total from the machine
- E. Non-add key--Identified by "N" or # symbol, used to identify an amount on the tape but amount does not become a part of the calculation
- F. Clear key--Identified by "C", clears an incorrect entry on the keyboard
- G. Total key--Identified by "T", recalls the sum from the accumulator and prints the total on the paper tape, and will also clear a total calculation from the accumulator

III. Learning the touch system

A. Position and posture

1. Sit erect with the machine placed slightly to the right of the body.
2. If right handed, use the right hand for operating the machine.
3. Use the left hand for handling papers.

B. Clearing the machine

1. Make sure there are no numbers in the machine from previous calculations by
    a. On a manual machine, depress the total key and pull the operating handle toward you.
    b. On an electric machine, depress the total key or the total and plus key twice.
2. When machine has been cleared, a symbol similar to one of the following appears on the tape: T, * ▱

C. Entering and printing numbers

1. Keyboard is operated with the first three fingers and thumb of the right hand.
2. The index finger is used to depress the 4, 7, and 1 keys.
3. The middle finger is used to depress the 5, 8, and 2 keys.
4. The ring finger is used to depress the 6, 9, and 3 keys.
5. The thumb is used to depress the zero key.
6. The little finger is used to depress the plus, minus, subtotal, and total keys; also the non-add.
7. The index finger is also used to depress the correction and repeat keys.
8. The index finger rests on the 4 key, the middle finger rests on the 5 key, and the ring finger rests on the 6 key--home position.
9. From the home position, the fingers move to strike the other keys.

10. To enter a number into the machine, depress the keys as you would on a typewriter, reading from left to right.

11. To print the number after it has been entered, depress the key for the operation indicated in the problem.

IV. Procedure used in operating an electric 10-key adding machine

A. Clear the machine.

B. Enter numbers on the keyboard by the touch method.

C. Depress processing key desired.

D. Print numbers on tape.

E. Take a total.

V. Clearing the machine

A. Clear the machine of previous entries by depressing the total key twice.

B. Check the tape for total symbol.

VI. Addition on the 10-key machine

A. Clear the machine. Look for the clear symbol on the tape.

B. Place fingers on the home row (4, 5, 6 keys).

C. Reading from left to right, enter the first amount.

D. Print the amount by depressing the plus or add key.

E. Reading from left to right, enter the second amount by depressing the keys.

F. Print the amount by depressing the plus or add key.

G. Enter and print the remaining numbers in the same manner until all numbers of the problem have been entered and printed.

H. Take a total by depressing the total key.

NOTE: Most machines automatically print a decimal point indicating dollars and cents. Ignore the decimal when working with whole numbers.

VII. Use of subtotal, non-add, and repeat keys

A. The subtotal key is used when a total is needed at a given point in a list of figures without clearing calculations in the machine.

1. Clear the machine.

2. Enter and print the first number.

3. Enter and print the second number (or more as indicated in problem).

4. Obtain a subtotal by depressing subtotal key.

5. Enter and print the remaining numbers.

6. Take a total. When total is printed, machine is cleared.

B. The non-add key is used when a series of figures need to be identified by a number.

1. Clear the machine.

2. Enter the number to be used for identifying purposes.

3. Depress the non-add key to print the number on the tape.

4. Enter and print the remaining numbers of the problem.

5. Take a total in the usual way. The total will not contain the amount entered to identify the problem.

C. The repeat key is used when a number is used several times.

1. Clear the machine.

2. Enter amount to be used several times in succession.

3. Hold down repeat key the number of times needed and then release (or depress repeat key and plus key to print the amount the number of times needed and then release).

4. Depress the correction key to remove the amount entered on the keyboard.

5. Enter and print remaining numbers of the problem using the repeat key where necessary. Use the correction key to remove the repeated amount entered.

6. Take a total.

VIII. Subtraction on the 10-key machine

A. Steps involved in subtraction

1. Clear the machine.

2. Enter the amount to be added on the keyboard.

3. Depress the "+" (plus) sign which prints the amount to be added.

4. Enter the amount which is to be subtracted.

5. Depress the "-" (minus) key which prints the amount to be subtracted.

6. Depress the total key for final total.

B. Use of subtraction key to correct errors

1. If incorrect numbers have been depressed and printed on tape, reenter the incorrect amount on the keyboard and subtract (thus removing the number from the total).

2. Enter the correct number and depress the plus "+" key.

C. Use of subtraction key in converting credit balances

1. When the amount subtracted is greater than the amount added, a credit balance will occur. The tape will show the total printed in red or will have "CR" beside the total. On a machine which is not equipped with credit balance, the total will be preceded by a group of 9's. This untrue answer must be converted by using the following procedure.

a. Enter this result on the keyboard and subtract it only one time.

b. Take a total, which is the true credit or negative balance.

c. Write CR by this result to remind yourself that it is a credit balance.

IX. Multiplication on the 10-key machine

A. Process performed same as pencil and paper exercise. In the following example,

```
   789 multiplicand, the
 x 345 multiplier
```

five is multiplied first; then the four; and lastly, the three. A total is taken.

B. On a 10-key machine, multiplication is performed in the following manner:

1. Enter the multiplicand (789) on the keyboard.
2. Hold down repeat key or repeat key and plus key to print the amount to be multiplied five times.
3. Move the amount entered on the keyboard (789) one place to the left by striking the zero key once.
4. You are now in position to multiply by the next number in the multiplier (4). Add four times, using the repeat mechanism.
5. Move the amount entered on the keyboard once again to the left by striking the zero key once again.
6. You are now in position to multiply by the third digit in the multiplier (3). Add three times, using the repeat mechanism, however release the repeat key before adding the last time; that is, hold down the repeat key long enough for the figure to be printed twice and depress the plus key for the third entry.
7. Take a total. The product should be 272,205, and the tape should read:

```
    7.89
    7.89
    7.89
    7.89
    7.89
   78.90
   78.90
   78.90
   78.90
  789.00
  789.00
  789.00
--------
2,722.05 (Ignore decimal point)
```

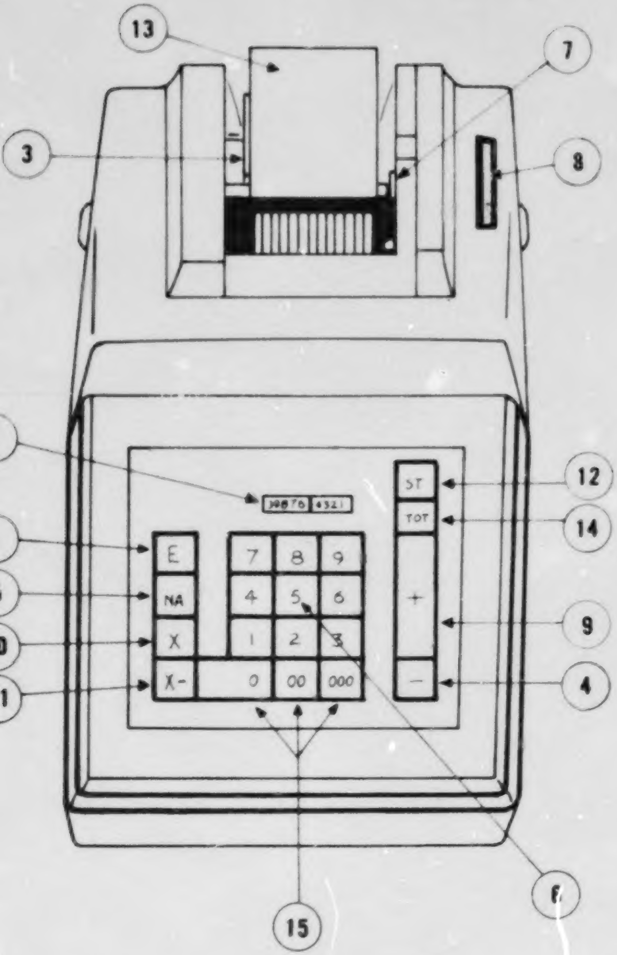
8. When multiplicand and/or multiplier contain decimal places, count the number of places in each and mark off that many places in the product.

Examples: 2.51 x 3.2 = 8.032

3.25 x 14 = 45.50

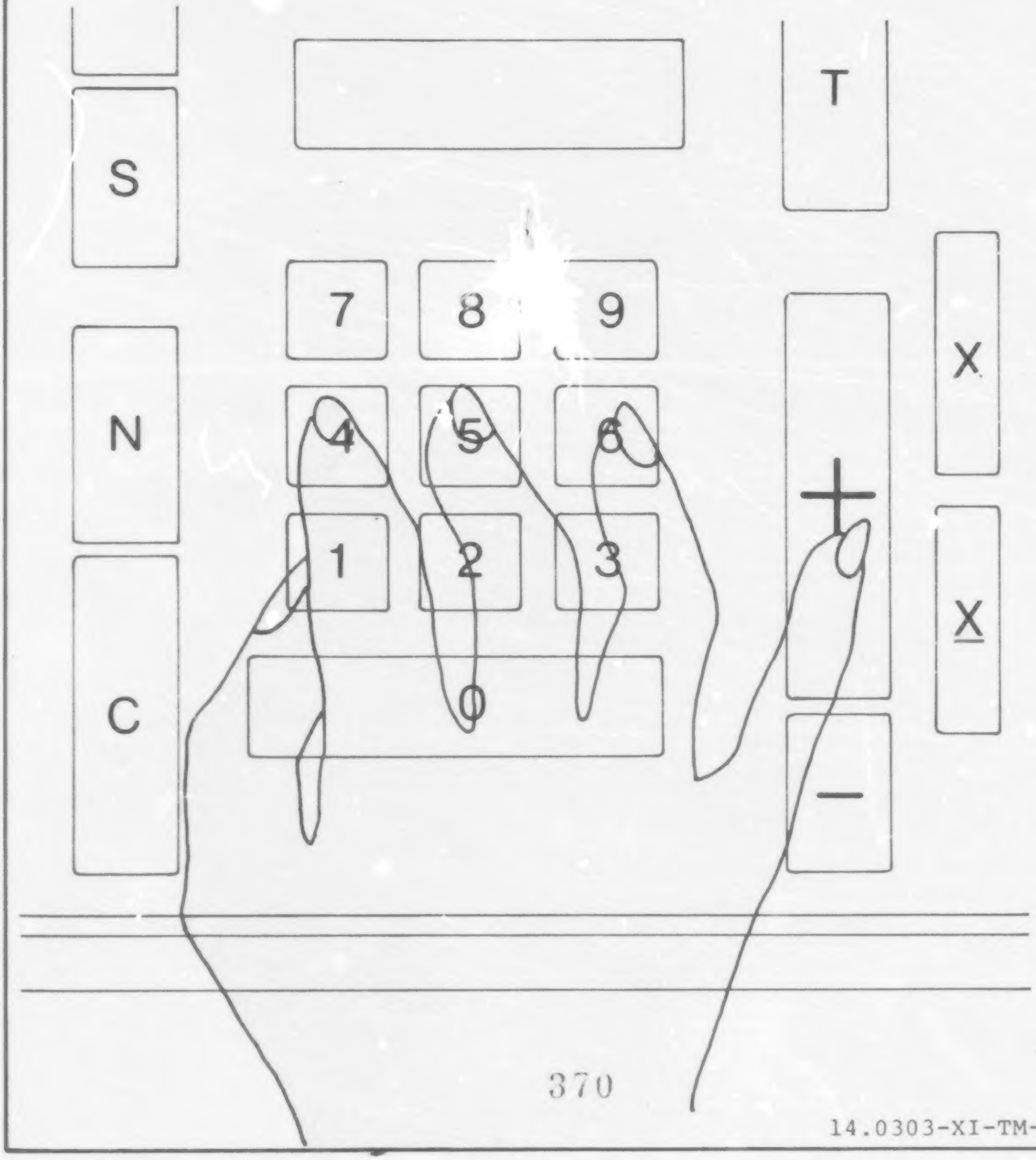
.146 x .52 = .07592

TEN-KEY ADDING MACHINE

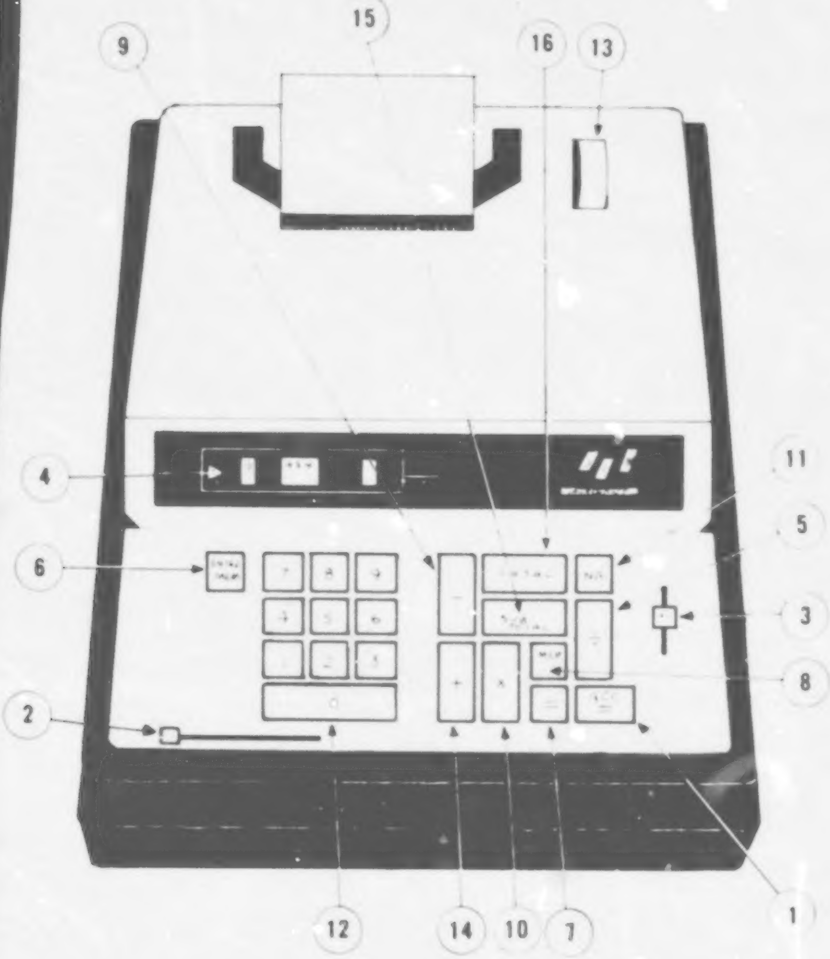


1 Clear Key (Lever)
2 Digit Indicator
3 Line Space Selector
4 Minus Bar (Key)
5 Non-Add Key
6 Numerial Keys
7 Paper Release Lever
8 Platen Knob
9 Plus Bar
10 Repeat Key
11 Repeat Subtract Key
12 Subtotal Key
13 Tape
14 Total Bar (Key)
15 Zero Keys

HOME KEY POSITION



MECHANICAL PRINTING CALCULATOR



1 Accumulation Equals Key
2 Clear Entry Key
3 Decimal Selector
4 Digit Indicator
5 Division Key
6 Enter Memory Key
7 Equals Key
8 Memory Recall Key
9 Minus Key
10 Multiplication Key
11 Non-Add Key
12 Number Keys
13 Platen Knob
14 Plus Key
15 Subtotal Key
16 Total Key

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UNIT XI

OPERATING THE 10-KEY ADDING MACHINE

JOB SHEET #1--ADDING BY TOUCH

I. Tools and equipment needed:

  A. 10-Key adding machine with tape

  B. Pencil to record answers

II. Job Procedures:

  A. Clear machine.

  B. Proceed with process as indicated according to information sheet.

  C. Add the following problems using the touch system.

Home Row - 4, 5, 6

(1)	(2)	(3)	(4)	(5)
546	546	465	564	465
465	654	456	645	645
654	465	645	456	564
565	456	546	465	456
645	564	654	654	546

Top Row - 7, 8, 9

(6)	(7)	(8)	(9)	(10)
474	747	696	789	679
585	858	969	465	869
696	969	858	968	479
475	458	747	489	659
698	468	968	568	469

Bottom Row - 1, 2, 3, and 0

(11)	(12)	(13)	(14)	(15)
414	426	105	741	520
525	231	360	852	408
636	321	410	963	899
103	532	632	592	540
203	612	231	704	321

All Rows

(16)
13
35
56
67
87

(17)
76
67
78
79
89

(18)
98
87
76
45
12

(19)
987
765
345
322
101

(20)
112
221
433
344
655

(21)
990
340
240
404
253

(22)
444
340
231
540
430

(23)
206
254
310
565
507

(24)
454
122
789
856
807

(25)
698
303
875
234
455

(26)
684
747
488
953
462

(27)
898
343
434
767
345

(28)
515
936
750
295
735

(29)
755
648
693
420
682

(30)
686
874
912
760
747

(31)
339
556
155
168
890

(32)
208
513
796
532
185

(33)
690
371
145
288
593

(34)
856
345
165
990
289

(35)
787
765
888
561
776

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UNIT XI

OPERATING THE 10-KEY ADDING MACHINE

JOB SHEET #2--USING THE SUBTOTAL, NON-ADD AND REPEAT KEYS

I. Tools and equipment needed:

  A. 10-Key adding machine with tape

  B. Pencil to record answers

II. Job Procedures:

  A. Clear machine.

  B. Proceed with process as indicated according to information sheet.

  C. Work the following problems using keys indicated by headings.

  D. For verification of answers, work each problem twice. If second total agrees with first total, place a check mark on the tape by the second total.

Subtotals = (S) indicates subtotal

(1)	(2)	(3)	(4)	(5)
452	185	300	471	444
110	369	275	855	134
916	250	309	399	464
639	622	772	287	625
S	S	S	S	S
400	298	595	261	190
175	345	703	187	613
298	185	398	883	787
225	952	125	925	935
T	T	T	T	T

(6)	(7)	(8)	(9)	(10)
167	733	451	119	561
889	365	724	641	306
101	896	675	497	823
23	986	824	724	145
S	S	S	S	S
527	240	126	451	872
240	109	691	420	154
328	338	724	651	563
900	467	75	989	986
T	T	T	T	T

Non-Add = (N) indicates non-add

(1)	(2)	(3)	(4)	(5)
549	381	685	74	578
989	30	965	283	407
489	866N	896	806	74
768N	245	421	939N	962N
346	753	312	544	678
846	12N	777N	67	225
8	47	596	461N	87
24	265	15	875	944
T	T	T	T	T

(6)	(7)	(8)	(9)	(10)
267	557	913	653	454
178	11	428	124	408
119	675N	388	544N	511
235N	824	16	675	94N
511	420	756N	532	710
324	2	931	82	987
34	889N	47	672	198N
7	445	8	105	70
T	T	T	T	T

Repeat Key

(1)	(2)	(3)	(4)	(5)
984	425	288	477	360
984	425	288	477	360
984	425	288	933	360
56	425	369	933	360
56	425	369	933	756
56	368	541	856	756
325	368	541	856	421
325	368	541	112	421
325	114	722	112	421
T	114	722	T	T
	T	T		

(6)	(7)	(8)	(9)	(10)
966	245	277	870	332
966	245	277	870	332
966	245	277	187	332
699	245	67	187	708
699	11	67	187	708
843	11	67	448	708
843	177	67	448	708
843	177	170	448	13
843	177	170	448	13
T	T	T	T	T

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UNIT XI

OPERATING THE 10-KEY ADDING MACHINE

JOB SHEET #3--USING THE SUBTRACTION KEY

I. Tools and equipment needed:

A. 10-Key adding machine with tape

B. Pencil to record answers

II. Job Procedures:

A. Clear machine.

B. Proceed with process as indicated according to information sheet.

C. Subtract and find credit balance on the following problems.

Subtraction:

(1)	(2)	(3)	(4)	(5)
54.76	65	12,226	365	745
-10.26	-31	-10,845	-188	-475

(6)	(7)	(8)	(9)	(10)
377	845	616	752	395
518	145	- 40	638	-78
-695	-254	456	-682	34
-125	754	880	761	-11
170	-435	-480	-612	29
		789		
		-160		

Credit Balance:

(1)	(2)	(3)	(4)	(5)
543	174	670	746	830
-769	-768	-987	-999	-1,780

(6)	(7)	(8)	(9)	(10)
362	180	171	941	410
32	-854	118	384	372
986	671	-538	-532	224
-642	146	284	24	-981
28	-362	-873	81	34
-843	176	334	-972	-621
36	-564	-268		74
-386				

(11)	(12)	(13)	(14)	(15)
882	497	658	489	-619
211	327	-931	525	550
-756	42	-582	-697	-901
360	-657	124	-740	47
-984	-811	14	31	-876
56	92	95	-98	449
64	-103	-360	118	316

(16)	(17)	(18)	(19)	(20)
396	6734	3021	209	92
-258	-2473	3021	403	87
76	1365	-8362	-900	-43
-844	-589	91	568	11
-962	-6106	740	-785	-539

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UNIT XI

OPERATING THE 10-KEY ADDING MACHINE

JOB SHEET #4--LEARNING TO MULTIPLY

I. Tools and equipment needed:

   A. 10-Key adding machine with tape

   B. Pencil to record answers

II. Job Procedures:

   A. Clear machine.

   B. Proceed with process as indicated according to information sheet.

   C. Multiply the following problems using repeated addition.

   D. Upon completion of problems, place a check in the right margin of tape to verify the accuracy of indexed numbers.

(1) 7 x 9	(2) 14 x 24	(3) 365 x 6	(4) 385 x 28	(5) 6,563 x 124
(6) 812 x 593	(7) 467 x 542	(8) 96 x 23	(9) 130 x 41	(10) 604 x 23
(11) 5.36 x 44	(12) 89.7 x 3.2	(13) 5.07 x 33	(14) .170 x .19	(15) 73.5 x 1.03
(16) 1.42 x 75	(17) 224 x .17	(18) 39.1 x 4.5	(19) .781 x 1.14	(20) 14.93 x 3.49

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UNIT XI

OPERATING THE 10-KEY ADDING MACHINE

ANSWERS TO JOB SHEETS

Job Sheet #1

(1) 2,875 (2) 2,685 (3) 2,766 (4) 2,784 (5) 2,676

(6) 2,928 (7) 3,500 (8) 4,238 (9) 3,279 (10) 3,155

(11) 1,881 (12) 2,122 (13) 1,738 (14) 3,852 (15) 2,688

(16) 258 (17) 389 (18) 318 (19) 2,520 (20) 1,765

(21) 2,227 (22) 1,985 (23) 1,842 (24) 3,028 (25) 2,565

(26) 3,334 (27) 2,787 (28) 3,231 (29) 3,198 (30) 3,979

(31) 2,108 (32) 2,234 (33) 2,087 (34) 2,645 (35) 3,777

Job Sheet #2

Subtotals

(1) 2,117S 3,215T (2) 1,426S 3,206T (3) 1,656S 3,477T (4) 2,012S 4,268T (5) 1,667S 4,192T

(6) 1,180S 3,175T (7) 2,980S 4,134T (8) 2,674S 4,290T (9) 1,981S 4,492T (10) 1,835S 4,410T

Non-add

(1) 3,251 (2) 1,721 (3) 3,890 (4) 2,649 (5) 2,993

(6) 1,440 (7) 2,259 (8) 2,731 (9) 2,843 (10) 3,140

Repeat Key

(1) 4,095 (2) 3,457 (3) 4,669 (4) 5,689 (5) 4,215

(6) 7,668 (7) 1,533 (8) 1,439 (9) 4,093 (10) 3,854

Job Sheet #3

Subtraction

(1) 44.50 (2) 34 (3) 1,381 (4) 177 (5) 270

(6) 245 (7) 1,055 (8) 2,061 (9) 857 (10) 369

Credit Balance

(1) 226 CR (2) 594 CR (3) 317 CR (4) 253 CR (5) 950 CR

(6) 427 CR (7) 607 CR (8) 772 CR (9) 74 CR (10) 488 CR

(11) 167 CR (12) 613 CR (13) 982 CR (14) 372 CR (15) 1034 CR

(16) 1592CR (17) 1069CR (18) 1489CR (19) 505 CR (20) 392 CR

Job Sheet #4

(1) 63 (2) 336 (3) 2,190 (4) 10,780 (5) 813,812

(6) 481,516 (7) 253,114 (8) 2,208 (9) 5,330 (10) 13,892

(11) 235.84 (12) 287.04 (13) 167.31 (14) .03230 (15) 75.705

(16) 106.50 (17) 38.08 (18) 175.95 (19) .89034 (20) 52.1057

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UNIT XI

OPERATING THE 10-KEY ADDING MACHINE

UNIT TEST

1. Define the following terms:

   a. 10-Key machine

   b. Listing

   c. Index a Number

   d. Home Position

   e. Touch System

2. Match the names of the major keys of a 10-Key adding machine with their identifying descriptions:

_____ a. Add key

_____ b. Subtract key

_____ c. Repeat key

_____ d. Subtotal key

_____ e. Non-add key

_____ f. Clear key

_____ g. Total key

1. Identified by "C", clears an incorrect entry on the keyboard.

2. Identified by "S" symbol used to supply partial total as needed; will print the amount that has been accumulated but will not clear the total from the machine.

3. Identified by "X" symbol, used to set up machine to perform multiplication process.

4. Identified by "+" symbol, used to index numbers to be added.

5. Identified by "N" or "#" symbol, used to identify an amount on the tape, but amount does not become part of calculation.

6. Identified by "T", recalls the sum from the accumulator and prints the total on the paper tape, and will also clear the total calculation from the accumulator.

7. Identified by "-" symbol, used to index numbers to be subtracted.

3. Write a brief paragraph citing the posture and operational procedures used in the touch method.

4. List in sequential order the procedures involved in operating an electric 10-key adding machine.

   a.

   b.

   c.

   d.

   e.

5. Cite the procedure used in clearing the machine.

6. List the steps involved in adding on the 10-Key machine.

   a.

   b.

   c.

   d.

   e.

   f.

7. Write a paragraph on each of the following instances, citing the procedure used:

   a. in finding a sub-total

   b. in numbering problems using the non-add key

c. in using the repeat key

8. Cite the use of the subtraction key in the following instances:

   a. in the steps involved in subtraction

   b. in correcting errors

c. in converting credit balances

9. In solving the multiplication problem 365 x 26, place the following steps in sequential order by numbering 1-6.

_____ a. Take a total of 9490.

_____ b. Enter the multiplicand on the keyboard.

_____ c. Move the amount entered on the keyboard to the left another place by striking the 0.

_____ d. Hold down the repeat key so number will be printed six times.

_____ e. Hold down the repeat key so number will be printed two times.

_____ f. Clear the keyboard.

10. Demonstrate the ability to:

a. Add by touch method.

b. Use the subtotal, non-add, and repeat keys.

c. Use the subtract key.

d. Use the repeat key to multiply.

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UNIT XI

OPERATING THE 10-KEY ADDING MACHINE

ANSWERS TO UNIT TEST

1. a. 10-Key machine--Machine which contains one numeric entry key for each of the digits 1-9, plus the 0, along with the usual operation keys

   b. Listing--Each calculation is printed on a paper tape.

   c. Index a Number--Used in entering a number on the keyboard

   d. Home Position--The starting position from which the fingers move to strike all the other keys

   e. Touch System--Learning use of key by touch rather than by sight

2. 4 a.

   7 b.

   3 c.

   2 d.

   5 e.

   1 f.

   6 g.

3. When using the touch system one should sit erect with the machine placed slightly to the right of the body so the right hand can be used to operate the machine while the left hand handles papers. The machine should be cleared by depressing the total key. The first three fingers should be placed on home keys 4, 5, and 6. The thumb operates the 0 key and the little finger operates the other operative keys.

4. a. Clear the machine.

   b. Enter numbers on the keyboard by the touch method.

   c. Depress processing key desired.

    d. Print numbers on tape.

    e. Take a total.

5. The machine is cleared of all numbers by depressing the total bar; however, the tape should be checked to be sure the total symbol has printed.

6. a. Clear the machine.

    b. Place fingers on home keys.

    c. Reading from left to right, enter the amount as read.

    d. Print the amount by depressing the plus or add key.

    e. Reading from left to right, enter the remaining numbers as read.

    f. Take a total by depressing the total key.

7. a. When finding a subtotal, one should depress the subtotal key. This key does not clear the calculation from the machine, but does give a total at that given point.

    b. When a series of figures need to be identified by a number, the number is depressed on the keyboard and is listed on the tape by depressing the non-add key.

    c. The repeat key is used when a number is used several times. Enter the desired number on the keyboard and depress the repeat "X" key the number of times required; then depress the clear key to remove the number from the keyboard. Proceed with problem. Take a total.

8. a. The subtraction key is used when a number is to be subtracted from a list of figures. Clear the machine, enter the amount to be added and depress the add key. Enter the amount to be subtracted and depress the subtract or "-" (minus) key. Take a total.

    b. When an incorrect number has been entered and printed, the same incorrect number should be entered and the subtract key depressed to remove it from the list of figures. The correct numbers should then be added into the list of figures.

    c. When converting credit balances that are preceded by a series of 9's, enter the same amount shown on tape and subtract it one time. Take a total which shows true credit balance.

9. 6 a.

1 b.

3 c.

2 d.

4 e.

5 f.

10. Evaluated to the satisfaction of the instructor.

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UNIT XII

OPERATING THE ELECTRONIC CALCULATOR

TERMINAL OBJECTIVE

After completing this unit, the student will be able to demonstrate the ability to operate the electronic calculator with speed and accuracy while using the touch system to compute simple to complex mathematical problems. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student will be able to:

1. Define terms associated with an electronic calculator.
2. Match the names of the major keys of the electronic calculator with their identifying descriptions.
3. Write a brief paragraph citing the posture and operational procedure used in the touch method.
4. List in sequential order the procedures involved in operating an electronic calculator.
5. Demonstrate the ability to:
    a. Perform addition, subtraction, division, and multiplication functions on an electronic calculator.
    b. Apply these functions to problems involving discounts, percentages, constants and proration.

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UNIT XII

OPERATING THE ELECTRONIC CALCULATOR

SUGGESTED ACTIVITIES

I. Instructor:

  A. Provide objective sheet.

  B. Discuss objective sheet.

  C. Provide information sheet.

  D. Discuss information sheet.

  E. Discuss and demonstrate steps involved in operational procedures for problem solving.

  F. Show transparencies.

  G. Provide job sheets.

  H. Discuss job sheets.

  I. Assign additional exercises in applicable workbooks.

  J. Give test and evaluate results.

II. Student:

  A. Read objective sheet.

  B. Participate in discussion of objective sheet.

  C. Read information sheet.

  D. Participate in discussion of information sheet.

  E. Participate in discussion and demonstration of steps involved in operational procedures for problem solving.

  F. View transparencies.

  G. Read job sheets.

  H. Complete job sheets.

  I. Complete additional exercises in applicable workbooks.

J. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objectives

  B. Information sheet

  C. Transparency masters

    1. XII-TM-1--Process Used to Solve Problems in Addition
    2. XII-TM-2--Process Used to Solve Problems in Subtraction
    3. XII-TM-3--Process Used to Solve Problems in Multiplication
    4. XII-TM-4--Process Used to Solve Problems in Division
    5. XII-TM-5--Process Used to Solve Discount Problems
    6. XII-TM-6--Process Used to Solve Multiplication Problems with Constants
    7. XII-TM-7--Process Used to Solve Percentage Problems

  D. Job sheets

    1. Job Sheet #1--Problems in Addition
    2. Job Sheet #2--Problems in Subtraction
    3. Job Sheet #3--Problems in Multiplication
    4. Job Sheet #4--Problems in Division
    5. Job Sheet #5--Discount Problems
    6. Job Sheet #6--Multiplication with Constants
    7. Job Sheet #7--Percentage Problems
    8. Job Sheet #8--Proration Problems

  E. Answers to job sheets

F. Test

G. Answers to test

II. References:

A. Albertson, Dorothy. Business Machines Practice Set. New York, New York: McGraw-Hill Book Company, 1974.

B. Cornelia, Nicholas J. and others. Office Machines Course. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1971.

C. Meehan, James and Allan Doerr. Solving Business Problems on the Electronic Calculator. New York, New York: McGraw-Hill Book Company, 1975.

D. Pasewark, William R. Electronic Display Calculator. Cincinnati, Ohio: South-Western Publishing Co., 1975.

E. Victor Programable Electronic Printing Calculator Programing Manual. Chicago, Illinois: Victor Comptometer Corporation, Inc., 1973.

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UNIT XII

OPERATING THE ELECTRONIC CALCULATOR

INFORMATION SHEET

I. Definition of terms

   A. Discount--A reduction made from a regular or list price

   B. Prorate--To divide, distribute, or assess proportionately

   C. Constant--Something invariable or unchanging, a number that has a fixed value

   D. Percent--Part of a whole expressed in hundredths

   E. Complement--Something that fills up, completes, or makes perfect, a quality or number required to make a thing complete

II. Major parts of calculators and their descriptions

   A. Switches--On and off switch located on the left side turns calculator on and off.

   B. Keys

      1. [0] - [9] keys--Enters numbers (limit 8 digits)

      2. [.] key--Enters a decimal point

         (NOTE: Only the first decimal entry is observed.)

      3. [+] key--Instructs calculator to add the previous number or result to the following number

         (NOTE: Repeated depressions continue to add the last number entered to the result.)

      4. [-] key--Instructs calculator to subtract the following number from the previous number or result

         (NOTE: Assigns a negative sign to the following number when used after a [x] or [÷] key. Repeated depressions continue to subtract the last number entered from the result.)

5. [x] key--Instructs calculator to multiply the previous number or result by the following number

6. [÷] key--Instructs calculator to divide the previous number or result by the following number

7. [=] key--Instructs calculator to complete the previously entered operations to provide the desired calculation result

8. [C] key--Clears (erases) information in calculator and display and sets calculator to zero for start of new problem

9. [CE] key--Clears the calculator and display of the last keyboard entry unless a function ([+], [-], [x], [÷], [%]) key has been pressed

10. [%] key--Used to find percentages of numbers

    (NOTE: When used with the [x] or [+] keys, the [%] key computes add-on percentages, such as taxes and totals. With the [-] key, the [%] key computes discounts and totals.

    When the [%] key is used in division, results are expressed as percentage. For example, the key sequence 125 [÷] 500 [%] gives 25% as the answer. The display will indicate 25. as the answer.)

11. [M+] key--Adds displayed number to memory

12. [M-] key--Subtracts displayed number from memory

13. [MR] key--Recalls number in memory to display

14. [MC] key--Clears only the memory

    (NOTE: Memory functions--add to, subtract from, or clear the memory without affecting the displayed number or calculation in progress.)

C. Display

1. Power on indication--The presence of digits in the display is indication that power is on.

2. Minus sign--Appears at the left of displayed number to indicate negative numbers

3. Decimal point--Automatically appears to the right of any number entered unless positioned in another sequence by use of [.] key

(NOTE: A zero will precede the decimal for decimal numbers.)

4. Calculation overflow indication--When a calculated result is more than eight digits, the sign will appear at the left of the display and the calculator will not accept any key instructions except the [C] or [CE] key.

   (NOTE: To determine the correct placement of the decimal, move the decimal point 8 places to the right. Pressing the [C] key will clear the number and the overflow condition from the calculator. Pressing the [CE] key will clear only.)

5. Automatic constant--Addition, subtraction, multiplication or division with a constant number is automatic.

   (NOTE: The first number entered in multiplication will be constant. The second number entered in the other three functions will be constant.)

6. Decimal alignment--In addition or subtraction problems, the calculator will display as many decimal places in a result as are contained in the entry with the most decimal places.

   Example: The result of the problem 1.273 - .203 is displayed as 1.070 instead of 1.07. This decimal alignment is maintained in addition and subtraction results until [C] is used or a number with more decimal places is entered.

7. Change sign--The [CS] key changes the sign of the displayed number.

   (NOTE: Convenient for entering negative numbers.)

8. Decimal point location--Automatically appears to the right of any number entered unless the [.] key is used

9. Calculation overflow--A flashing display indicates that the result is more than eight digits to the left of the decimal.

   (NOTE: The calculator will not except [CE] or [C]. Press [CE]* to clear only the overflow condition. The displayed number will remain with the decimal shifted eight places to the left of its original position. To determine the correct placement of the decimal, mentally move it eight places to the right. Press [C]* to clear all numbers and the overflow condition from the calculator.)

10. Memory overflow--The display flashes when the memory total exceeds eight digits, and the calculator will not accept further entries. Press [C]* twice to clear calculator. Press [MC]* [CE]* to clear memory but retain the displayed number.

*Hold key down momentarily.

III. Using the touch system

A. Position and posture

1. Sit erect with the machine slightly to the right of the body.

2. Use the right hand for operating the machine.

3. Use the left hand for handling papers.

B. Clearing the machine

1. Make sure there are no numbers in the machine from previous calculations by depressing the total key.

2. When machine has been cleared, a symbol similar to one of the following should appear on the tape or display window: T, *, ▱, or 0.

C. Entering and printing numbers

1. Keyboard is operated with the first three fingers and thumb of the right hand.

2. The index finger is used to depress the 4, 7, and 1 keys.

3. The middle finger is used to depress the 5, 8, and 2 keys.

4. The ring finger is used to depress the 6, 9, and 3 keys.

5. The thumb is used to depress the zero key.

6. The little finger is used to depress the plus, minus, subtotal non-add and total keys.

7. The index finger is also used to depress any of the other operational keys located on the left of the machine.

8. The index finger rests on the 4 key, the middle finger rests on the 5 key, and the ring finger rests on the 6 key--home position.

9. From the home position, the fingers move either up or down to strike the other keys.

10. To enter a number into the machine, depress the keys as you would on a typewriter, reading from left to right.

11. To print the number after it has been entered, depress the key for the operation indicated in the problem.

IV. Procedures used in operating an electronic calculator

A. Addition

A. Clear the machine. Look for the clear symbol on the tape or display window.

B. Place your fingers on the home row (4, 5, 6 keys).

C. Enter the first amount in the following way, entering the first digit reading from left to right.

D. Print the amount by depressing the plus or add key.

E. Enter the second amount by depressing and releasing the keys reading again from left to right.

F. Print the amount by depressing the plus or add key.

G. Enter and print the remaining numbers in the same manner until all numbers of the problem have been entered and printed.

H. Take a total by depressing the total key.

B. Subtotal key

1. Clear the machine.

2. Enter and print the first number.

3. Enter and print the second number (or more as indicated in problem).

4. Obtain a subtotal by depressing the subtotal key.

5. Enter and print the remaining numbers.

6. Take a total. When total is printed, machine is cleared.

C. Non-add key

1. Clear the machine.

2. Enter the amount to be used to identify the problem.

3. Depress the non-add key to print the number on the tape.

4. Enter and print the remaining numbers of the problem.

5. Take a total in the usual way. The total will not contain the amount entered to identify the problem.

D. Subtraction

1. Clear the machine.

2. Enter the amount to be added on the keyboard.

3. Print the amount to be added by depressing the plus key.

4. Enter the amount to be subtracted on the keyboard.

5. Print the amount to be subtracted by depressing the minus key.

6. Take a total.

E. Correction of errors by subtraction

1. Before they are printed on the tape, incorrect amounts are corrected by using the correction key.

2. After they are printed on the tape

    a. If the incorrect amount was added, re-enter the incorrect amount on the keyboard and subtract.

    b. If the incorrect amount was subtracted, re-enter the incorrect amount on the keyboard and add.

F. Credit or negative balances--When the amount subtracted is larger than the amount added (indicated by red total or number prefaced by minus sign on display) record total with 'CR'.

1. Clear the machine.
2. Enter and print the amount to be added.
3. Enter and print the amount to be subtracted.
4. Take a total. Symbols mentioned above will indicate whether credit or negative balance has occurred.

G. Multiplication

1. Clear the machine.
2. Enter multiplicand.
3. Register multiplicand. Depress [x] key.
4. Enter multiplier and depress [=] key.
5. Find answer.
6. Record answer.
7. Clear machine.

H. Division

1. Clear machine.
2. Enter dividend on keyboard.
3. Register dividend with entry key.
4. Enter divisor on keyboard.
5. Obtain answer on tape or display window with divide key.
6. Record answer.
7. Clear machine.

PROCESS USED TO SOLVE PROBLEMS IN ADDITION

PREPARE MACHINE

⇩

ENTER ADDEND

⇩

REGISTER ADDEND

⇩

ENTER MORE ADDENDS

⇩

FIND TOTAL

⇩

RECORD TOTAL

⇩

CLEAR MACHINE

PROCESS USED TO SOLVE PROBLEMS IN SUBTRACTION

PREPARE MACHINE

⇩

ENTER MINUEND

⇩

REGISTER MINUEND

⇩

ENTER SUBTRAHEND

⇩

REGISTER SUBTRAHEND

⇩

FIND ANSWER

⇩

RECORD ANSWER

⇩

CLEAR MACHINE

PROCESS USED TO SOLVE PROBLEMS IN MULTIPLICATION

PREPARE MACHINE

⇩

ENTER MULTIPLICAND

⇩

REGISTER MULTIPLICAND

⇩

ENTER MULTIPLIER

⇩

FIND ANSWER

⇩

RECORD ANSWER

⇩

CLEAR MACHINE

PROCESS USED TO SOLVE PROBLEMS IN DIVISION

PREPARE MACHINE

⇩

ENTER DIVIDEND

⇩

REGISTER DIVIDEND

⇩

ENTER DIVISOR

⇩

OBTAIN ANSWER

⇩

RECORD ANSWER

⇩

CLEAR MACHINE

PROCESS USED TO SOLVE DISCOUNT PROBLEMS

PREPARE MACHINE
⇩
ENTER ORIGINAL AMOUNT
⇩
REGISTER ORIGINAL AMOUNT
⇩
ENTER DISCOUNT PER CENT
⇩
OBTAIN DISCOUNT
⇩
RECORD DISCOUNT
⇩
OBTAIN NET AMOUNT
⇩
RECORD NET AMOUNT
⇩
CLEAR MACHINE

PROCESS USED TO SOLVE MULTIPLICATION PROBLEMS WITH CONSTANTS

PREPARE MACHINE

⇩

ENTER CONSTANT

⇩

REGISTER CONSTANT

⇩

ENTER VARIABLE

⇩

OBTAIN ANSWER

⇩

RECORD ANSWER

⇩

ENTER OTHER VARIABLES

⇩

CLEAR MACHINE

PROCESS USED TO SOLVE PERCENTAGE PROBLEMS

PREPARE MACHINE

⇩

ENTER COST OR SELLING PRICE

⇩

REGISTER COST OR SELLING PRICE

⇩

ENTER MARKUP OR MARKDOWN PRICE IN PERCENT

⇩

OBTAIN ANSWER

⇩

RECORD ANSWER

⇩

CLEAR MACHINE

14.0303

UNIT XII

OPERATING THE ELECTRONIC CALCULATOR

JOB SHEET #1--PROBLEMS IN ADDITION

I. Tools and equipment needed:

A. Calculator

B. Pencil or pen to record answers

II. Procedures:

Clear machine and proceed with addition process as indicated according to information sheet.

Home Row - 4, 5, 6

1.	2.	3.	4.	5.
546	645	546	654	465
565	546	645	564	546
456	456	654	456	554
645	645	465	645	466
564	564	664	546	654

Top Row - 7, 8, 9

1.	2.	3.	4.	5.
789	585	696	789	679
879	885	858	465	847
978	696	747	945	569
474	669	956	876	647
744	477	845	598	869

Bottom Row - 1, 2, 3 and 0

1.	2.	3.	4.	5.
414	221	103	592	520
302	532	320	863	804
103	612	410	230	321
321	406	632	703	310
123	300	132	961	366

Subtotals - S indicates subtotal

1.	2.	3.	4.	5.
542	581	200	714	444
110	639	275	558	312
691	250	903	399	565
963	226	S	278	S
S	S	772	S	625
400	982	955	162	190
751	453	307	871	S
982	815	S	883	631
522	592	398	259	787
T	T	123	T	539
		T		T

Non-Add - N indicates non-add

1.	2.	3.	4.	5.
954	77	865	90	875
989	318	693	283	704
456	60N	724N	504N	63
768N	245	421	67	216
346	763	312	431N	944N
8	974N	564	298	307
29	866	28	875	26
138	504	30	380	935
T	T	T	T	T

14.0303

UNIT XII

OPERATING THE ELECTRONIC CALCULATOR

JOB SHEET #2--PROBLEMS IN SUBTRACTION

I. Tools and equipment needed:

  A. Calculator

  B. Pen or pencil

II. Procedures:

Clear machine and proceed with subtraction process as indicated according to information sheet.

Subtraction:

$$1.\ \begin{array}{r} 47.56 \\ -\ 26.10 \\ \hline \end{array} \qquad 2.\ \begin{array}{r} 87 \\ -\ 36 \\ \hline \end{array} \qquad 3.\ \begin{array}{r} 12,468 \\ -\ 10,312 \\ \hline \end{array} \qquad 4.\ \begin{array}{r} 653 \\ -\ 276 \\ \hline \end{array} \qquad 5.\ \begin{array}{r} 754 \\ -\ 470 \\ \hline \end{array}$$

$$6.\ \begin{array}{r} 773 \\ 815 \\ -\ 695 \\ 170 \\ -\ 186 \\ \hline \end{array} \qquad 7.\ \begin{array}{r} 485 \\ 415 \\ -\ 524 \\ 574 \\ -\ 354 \\ \hline \end{array} \qquad 8.\ \begin{array}{r} 798 \\ -\ 106 \\ 880 \\ -\ 460 \\ 546 \\ 50 \\ 616 \\ \hline \end{array}$$

Credit Balance:

$$1.\ \begin{array}{r} 463 \\ -\ 697 \\ \hline \end{array} \qquad 2.\ \begin{array}{r} 364 \\ -\ 768 \\ \hline \end{array} \qquad 3.\ \begin{array}{r} 726 \\ -\ 954 \\ \hline \end{array} \qquad 4.\ \begin{array}{r} 321 \\ -\ 654 \\ \hline \end{array} \qquad 5.\ \begin{array}{r} 830 \\ -\ 1,936 \\ \hline \end{array}$$

6\.
896
632
84
- 698
82
- 896
63
- 986

7\.
328
- 548
176
461
- 623
167
- 465
33

8\.
132
108
- 835
284
348
- 682
65

14.0303

UNIT XII

OPERATING THE ELECTRONIC CALCULATOR

JOB SHEET #3--PROBLEMS IN MULTIPLICATION

I. Tools and equipment needed:

A. Calculator

B. Pen or pencil

II. Procedures:

Clear machine and proceed with multiplication process as indicated in information sheet.

1. 134
   x 32

2. 721
   x 8

3. 637
   x 411

4. 845
   x 43

5. 809
   x 120

6. 63.2
   x 2.5

7. 43.66
   x 2.53

8. 16.306
   x 4.8

9. 3.64
   x .29

10. 18.52
    x 6.3

11. 44.8
    x 6

12. .76
    x 93

13. 106
    x .08

14. 321.08
    x 8.06

15. 1,483
    x 681

14.0303

UNIT XII

OPERATING THE ELECTRONIC CALCULATOR

JOB SHEET #4--PROBLEMS IN DIVISION

I. Tools and equipment needed:

- A. Calculator
- B. Pen or pencil

II. Procedures:

Clear machine and proceed with division process as indicated in information sheet. Round off to two decimal places.

1. 144 ÷ 12 =
2. 625 ÷ 5 =
3. 1,728 ÷ 144 =
4. 1,725 ÷ 25 =
5. 3,136 ÷ 14 =
6. 1,344 ÷ 28 =
7. 486 ÷ 46 =
8. 7,643 ÷ 53 =
9. 360 ÷ .18 =
10. 50.16 ÷ 4 =

14.0303

UNIT XII

OPERATING THE ELECTRONIC CALCULATOR

JOB SHEET #5--DISCOUNT PROBLEMS

I. Tools and equipment needed:

- A. Calculator
- B. Pen or pencil to record answers

II. Procedures:

Clear machine and proceed with discount problems according to information below.

- A. Enter original amount.
- B. Register original amount by depressing multiplication key.
- C. Enter discount percent that has been changed to decimal fraction.
- D. Obtain discount by depressing the equals key.
- E. Record discount amount.
- F. Obtain net amount by:
  - 1. subtracting discount amount from original amount, or
  - 2. by multiplying the original amount by complement (100%-discount amount) of discount amount that has been changed to a decimal fraction.
- G. Record net amount.
- H. Clear machine.

		AMOUNT OF DISCOUNT	NET AMOUNT
1.	863.72 less 2%	________	________
2.	761.29 less 11%	________	________

	AMOUNT OF DISCOUNT	NET AMOUNT
3. 936.42 less 9%		
4. 1,627.99 less 67%		
5. 27.16 less 3%		
6. 914.44 less 5%		
7. 47.47 less 15%		
8. 379.99 less 50%		
9. 462.86 less 12%		

14.0303

UNIT XII

OPERATING THE ELECTRONIC CALCULATOR

JOB SHEET #6--MULTIPLICATION WITH CONSTANTS

I. Tools and equipment needed:

   A. Calculator

   B. Pen or pencil

   C. Paper for recording answers

II. Procedures:

   Clear machine and proceed with problems according to information below.

   A. Prepare machine.

   B. Index the constant factor and depress the multiplication key.

   C. Index variable or non-constant factor and strike the equals key.

      NOTE: On some machines the constant must be the second factor entered. In this case, reverse the factors entered in B and C and continue.

   D. Obtain answer and record answer.

   E. Index the next variable or non-constant factor and strike the equals key.

   F. Continue until problem is completed.

PAYROLL

Johnson	36 hrs.	@	$2.30 hr.	
Franks	33 hrs.	@	2.30 hr.	
Haltom	27 hrs.	@	2.30 hr.	
Carrly	40 hrs.	@	2.30 hr.	
Hughes	39 hrs.	@	2.30 hr.	
			TOTAL	

SALES SLIP

YARN

6 bolts	@	$1.26 bolt	
3 bolts	@	1.26 bolt	
126 bolts	@	1.26 bolt	
412 bolts	@	1.26 bolt	
139 bolts	@	1.26 bolt	
		TOTAL	

MATERIAL

126 bolts	@	$12.86 bolt	
462 bolts	@	12.86 bo[illegible]	
1167 bolts	@	12.86 b[illegible]	
1011 bolts	@	12.86 bolt	
4044 bolts	@	12.86 bolt	
		TOTAL	
		GRAND TOTAL	

14.0303

UNIT XII

OPERATING THE ELECTRONIC CALCULATOR

JOB SHEET #7--PERCENTAGE PROBLEMS

I. Tools and equipment needed:

  A. Calculator

  B. Pen or pencil

  C. Paper to record answers

II. Procedures:

Clear machine and proceed with problems according to information below.

  A. Finding markup price--To find markup price in percent, add percent of markup to cost percent (100%).

  Example: 15% markup - add 15% to 100% = 115% or 1.15 when converted to decimals.

    1. Enter cost of article.

    2. Register cost of article by depressing multiplication key.

    3. Enter decimal percentage of markup.

    4. Register precentage of markup by depressing equals key.

    5. Obtain answer.

    6. Record answer.

  B. Finding markdown price--To find markdown price, substract percent of markdown from selling percent (100%).

  Example: 25% markdown - subtract 25% from 100% = 75% or .75 when converted to decimals. (This .75 is also known as the complement.)

    1. Clear machine.

    2. Enter selling price on keyboard.

3. Register selling price by depressing multiplication key.

4. Enter markdown percent (complement).

5. Register markdown by depressing equals key.

6. Obtain answer and record.

C. Finding amount of commission--To find sales commission (a fee paid to an agent or employee for transacting a piece of business or performing a service - a percentage of money received), convert commission percent to decimals. Change fractions to their decimal equivalents and move the decimal point two places to the left.

1. Clear the machine.

2. Change the percent to decimal equivalent.

3. Multiply the amount of the sales by the commission percent decimal equivalent.

4. Round off the answer to two decimal places.

5. Record the answer.

III. Problems:

A.

	Cost of Article	Percent of Markup	Markup Price
1.	26.13	13%	
2.	162.36	92%	
3.	117.77	14%	
4.	93.66	16%	
5.	262.77	105%	

B.

	Selling Price	Percent of Markdown	
1.	69.69	25%	
2.	199.95	33%	
3.	206.66	10%	
4.	576.42	50%	
5.	33.12	20%	

C.

MAYFLOWER SALES REPORT

WEEKLY SALES COMMISSION

For week ending April 6, 19__

Individual	Total Sales	Percent of Commission	Commission Earned
Jackson	6,246.82	5%	
Antone	543.61	10%	
Wilson	1,216.66	8%	
Smith	4,512.44	16%	
Hemphill	12,621.99	21%	
Eaton	2,666.84	9%	
Frisco	997.12	3%	
Hernandez	6,682.82	14%	
El Fonce	4,621.32	21%	
Brownley	876.22	25%	

14.0303

UNIT XII

OPERATING THE ELECTRONIC CALCULATOR

JOB SHEET #8--PROBLEMS IN PRORATING PERCENTAGES

I. Tools and equipment needed:

   A. Calculator

   B. Pen or pencil

   C. Paper to record answers

II. Procedures:

   Clear machine and proceed with proration problems according to information below.

   A. Find the total expense by totaling expense of each department.

   B. Store total expenses in memory.

   C. Enter amount of expense for first department and depress division key. (If machine does not add decimals and zeros, add a decimal and at least four zeros to dividend before depressing divide key.)

   D. Recall total expense and depress equal key.

   E. Move decimal two places to the right to convert to percent and record prorated expense for first department.

   F. Enter amount of expense for second department and depress division key, adding a decimal and zeros if necessary.

   G. Recall total expense and depress equal key. Convert answer to percent and record prorated expense for second department.

   H. Continue procedure for all departments.

   I. Add the percent column and verify total to be 100%.

PRORATING PERCENTAGES

DEPARTMENT	EXPENSE	PERCENTAGE
Childrens Wear	$216	
Housewares	112	
Linens	207	
Mens Wear	276	
Ladies Wear	286	
Womens Accessories	143	
Furniture	196	
Radio and TV	103	
Budget Wear	136	
Leather Goods	52	
Office	309	
TOTALS		

14.0303

UNIT XII

OPERATING THE ELECTRONIC CALCULATOR

ANSWERS TO JOB SHEETS

Job Sheet #1

Home Row:

1. 2776
2. 2856
3. 2974
4. 2865
5. 2685

Top Row:

1. 3864
2. 3312
3. 4102
4. 3673
5. 3611

Bottom Row:

1. 1263
2. 2071
3. 1597
4. 3349
5. 2321

Subtotals:

1.	2306 S	4961 T
2.	1696 S	4538 T

3. 1378 S 3412 S 3933 T
4. 1949 S 4124 T
5. 1321 S 2136 S 4093 T

Non-Add:

1. 2920 T
2. 2773 T
3. 2913 T
4. 1993 T
5. 3126 T

Job Sheet #2

Subtraction:

1. 21.46
2. 51
3. 2156
4. 377
5. 284
6. 877
7. 596
8. 2324

Credit Balance:

1. 234 Cr
2. 404 Cr
3. 228 Cr
4. 333 Cr
5. 1106 Cr
6. 823 Cr
7. 471 Cr
8. 580 Cr

Job Sheet #3

1. 4288
2. 5768
3. 261,807
4. 36,335
5. 97,080
6. 158
7. 110.4598
8. 78.2688
9. 1.0556
10. 116.676
11. 268.8
12. 70.68
13. 8.48
14. 2587.90
15. 1,009,923

Job Sheet #4

1. 12
2. 125
3. 12
4. 69
5. 224
6. 48
7. 10.57
8. 144.21
9. 2000
10. 12.54

XII-514

Job Sheet #5

Amount of discount	Net Amount
17.27	846.45
83.74	677.55
84.28	852.14
1090.75	537.24
.81	26.35
45.72	868.72
7.12	40.35
189.99	189.99
55.54	407.32

Job Sheet #6

Payroll

82.80
75.90
62.10
92.00
89.70
402.50 Total

Sales Slip

Yarn

7.56
3.78
158.76
519.12
175.14
864.36 Total

Material

1,620.36

5,941.32

15,007.62

13,001.46

52,005.84

87,576.60 Total

88,843.46 Grand Total

Job Sheet #7

A. 1. 29.53

2. 311.73

3. 134.26

4. 108.65

5. 538.68

B. 1. 52.27

2. 133.97

3. 185.99

4. 288.21

5. 26.50

C. 312.34

54.36

97.33

721.99

2,650.62

240.02

29.91

935.59

C. (con't.)

970.48

219.06

Job Sheet #8

Percentage

10.61

5.50

10.17

13.56

14.05

7.02

9.63

5.06

6.68

2.55

15.18

100.01 Total

Expense

2036 Total

14.0303

UNIT XII

OPERATING THE ELECTRONIC CALCULATOR

UNIT TEST

1. Define the following terms:

   a. Discount

   b. Prorate

   c. Constant

   d. Percentage

   e. Complement

2. Match the names of the major keys of the electronic calculator with their identifying descriptions by selecting the correct letter and placing it on the line to the left of the term.

   A. Electronic printing

_____ 1. [0] - [9]

_____ 2. [.]

_____ 3. [+]

_____ 4. [-]

_____ 5. [x]

_____ 6. [÷]

_____ 7. [=]

_____ 8. [C]

_____ 9. [CE]

_____ 10. [%]

a. Instructs calculator to subtract the following number from the previous number or result

b. Instructs calculator to add the previous number or result to the following number

c. Clears (erases) information in calculator and display and sets calculator to zero for start of new problem

d. Adds displayed number to memory

e. Enters numbers (limit 8 digits)

______11. [M+]

______12. [M-]

______13. [MR]

______14. [MC]

f. Clears the calculator and display of the last keyboard entry unless a function ([+], [-], [x], [=], [%]) key has been pressed

g. Clears only the memory

h. Instructs calculator to divide the previous number or result by the following number

i. Enters a decimal point

j. Used to find percentages of numbers

k. Instructs calculator to multiply the previous number or result by the following number

l. Subtracts displayed number from memory

m. Recalls number in memory to display

n. Instructs calculator to complete the previously entered operations to provide the desired calculation result.

B. Display calculators

______ 1. Power on indication

______ 2. Minus sign

______ 3. Decimal point

______ 4. Calculation overflow indication

______ 5. Automatic constant

______ 6. Decimal alignment

______ 7. Change sign

______ 8. Decimal point location

______ 9. Calculation overflow

______10. Memory overflow

a. The presence of digits in the display is indication that power is on.

b. A flashing display indicates that the result is more than eight digits to the left of the decimal.

c. Changes the sign of the displayed number

d. The display flashes when the memory total exceeds eight digits, and the calculator will not accept further entries.

e. Appears at the left of displayed number to indicate negative numbers

f. In addition or subtraction problems, the calculator will display in a result as many decimal places as are contained in the entry with the most decimal places.

g. Automatically appears to the right of any number entered unless the [.] key is used

h. Automatically appears to the right of any number entered unless positioned in another sequence by use of [.] key

i. Addition, subtraction, multiplication, or division with a constant number is automatic.

j. When a calculated result is more than eight digits, the sign will appear at the left of the display and the calculator will not accept any key instructions except the [C] or [CE] key.

3. Write a brief paragraph citing the posture and operational procedure used in the touch method.

4. Place the following list of machine operations in correct sequential order by putting a number to the left of each statement. (Number 1 should be the first step; number 2 should be second step, etc.)

Addition:

_____ a. Enter and print the remaining numbers in the same manner until all numbers of the problem have been entered and printed.

_____ b. Enter the first amount in the following way, entering the first digit reading from left to right.

_____ c. Print the amount by depressing the plus or add key.

_____ d. Take a total by depressing the total key.

_____ e. Place your fingers on the home row (4, 5, 6 keys).

_____ f. Enter the second amount by depressing and releasing the keys reading again from left to right.

_____ g. Print the amount by depressing the plus or add key.

_____ h. Clear the machine. Look for the clear symbol on the tape or display window.

Subtotal key:

_____ a. Take a total. When total is printed, machine is cleared.

_____ b. Clear the machine.

_____ c. Enter and print the second number (or more as indicated in problem).

_____ d. Enter and print the remaining numbers.

_____ e. Enter and print the first number.

_____ f. Obtain a subtotal by depressing the subtotal key.

Non-Add key:

_____ a. Enter and print the remaining numbers of the problem.

_____ b. Depress the non-add key to print the number on the tape.

_____ c. Take a total in the usual way. The total will not contain the amount entered to identify the problem.

_____ d. Clear the machine.

_____ e. Enter the amount to be used to identify the problem.

Subtraction:

_____ a. Print the amount to be added by depressing the plus key.

_____ b. Take a total.

_____ c. Print the amount to be subtracted by depressing the minus key.

_____ d. Clear the machine.

_____ e. Enter the amount to be subtracted on the keyboard.

_____ f. Enter the amount to be added on the keyboard.

Credit or negative balances:

_____ a. Take a total. Symbols mentioned above will indicate whether credit or negative balance has occurred.

_____ b. Clear the machine.

_____ c. Enter and print the amount to be added.

_____ d. Enter and print the amount to be subtracted.

Multiplication:

_____ a. Enter multiplicand.

_____ b. Find answer.

_____ c. Clear the machine.

_____ d. Record answer.

_____ e. Enter multiplier and depress [=] key.

_____ f. Register multiplicand. Depress [x] key.

Division:

_____ a. Register dividend with entry key.

_____ b. Obtain answer on tape or display window with divide key.

_____ c. Enter dividend on keyboard.

_____ d. Record answer.

_____ e. Enter divisor on keyboard.

_____ f. Clear machine.

5. Demonstrate the ability to:

   a. perform addition, subtraction, division, and multiplication functions on an electronic calculator.

   b. apply these functions to problems involving discounts, percentages, constants, and proration.

   (NOTE: If these activities have not been accomplished prior to the test, ask the instructor when they should be completed.)

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UNIT XII

OPERATING THE ELECTRONIC CALCULATOR

ANSWERS TO UNIT TEST

1. a. Discount--A reduction made from a regular or list price

   b. Prorate--To divide, distribute, or assess proportionately

   c. Constant--Something invariable or unchanging, a number that has a fixed value

   d. Percentage--Part of a whole expressed in hundredths

   e. Complement--Something that fills up, completes, or makes perfect, a quality or number required to make a thing complete

2. Electronic printing

e 1.

i 2.

b 3.

a 4.

k 5.

h 6.

n 7.

c 8.

f 9.

j 10.

d 11.

l 12.

m 13.

g 14.

Display calculators

a 1.

e 2.

h 3.

j 4.

i 5.

f 6.

c 7.

g 8.

b 9.

d 10.

3. Using the touch system

   A. Position and posture

      1. Sit erect with the machine slightly to the right of the body.

      2. Use the right hand for operating the machine.

      3. Use the left hand for handling papers.

   B. Clearing the machine

      1. Make sure there are no numbers in the machine from previous calculations by depressing the total key.

      2. When machine has been cleared, a symbol similar to one of the following should appear on the tape or display window: T, *, ▱, or 0.

   C. Entering and printing numbers

      1. Keyboard is operated with the first three fingers and thumb of the right hand.

      2. The index finger is used to depress the 4, 7, and 1 keys.

      3. The middle finger is used to depress the 5, 8, and 2 keys.

      4. The ring finger is used to depress the 6, 9, and 3 keys.

5. The thumb is used to depress the zero keys.

6. The little finger is used to depress the plus, minus, subtotal, non-add and total keys.

7. The index finger is also used to depress any of the other operational keys located on the left of the machine.

8. The index finger rests on the 4 key, the middle finger rests on the 5 key, and the ring finger rests on the 6 key--home position.

9. From the home position, the fingers move either up or down to strike the other keys.

10. To enter a number into the machine, depress the keys as you would on a typewriter, reading from left to right.

11. To print the number after it has been entered, depress the key for the operation indicated in the problem.

4. Addition

7 a.

3 b.

4 c.

8 d.

2 e.

5 f.

6 g.

1 h.

Subtotal key

6 a.

1 b.

3 c.

5 d.

2 e.

4 f.

Non-Add key

__4__ a.

__3__ b.

__5__ c.

__1__ d.

__2__ e.

Subtraction

__3__ a.

__6__ b.

__5__ c.

__1__ d.

__4__ e.

__2__ f.

Credit or negative balances

__4__ a.

__1__ b.

__2__ c.

__3__ d.

Multiplication

__2__ a.

__5__ b.

__1__ c.

__6__ d.

__4__ e.

__3__ f.

Division

__3__ a.

5 b.

2 c.

6 d.

4 e.

1 f.

5. Evaluated to the satisfaction of the instructor.

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UNIT XIII

OPERATING THE FLUID DUPLICATOR

TERMINAL OBJECTIVE

After completion of this unit, the student will be able to select proper master units, type legible uniform masters, and operate the fluid duplicator. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student will be able to:

1. Define terms associated with fluid duplication.
2. Identify the features of fluid duplication.
3. Name the five items used in fluid duplication.
4. Explain how to prepare a fluid master.
5. Match the names to the descriptions of the parts of the fluid duplicator.
6. Discuss the process of operating the fluid duplicator.
7. Demonstrate the ability to:
    a. Type a fluid master.
    b. Run a fluid master.
    c. Prepare a thermal master.

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UNIT XIII

OPERATING THE FLUID DUPLICATOR

SUGGESTED ACTIVITIES

I. Instructor:

  A. Provide objective sheet.

  B. Discuss objective sheet.

  C. Provide information sheet.

  D. Discuss information sheet.

  E. Make transparencies.

  F. Explain and demonstrate inserting, typing, and correcting a fluid master and preparing thermal masters.

  G. Explain and demonstrate use of the fluid duplicator.

  H. Provide assignment sheets.

  I. Discuss assignment sheets.

  J. Provide job sheets.

  K. Discuss job sheets.

  L. Give test and evaluate results.

II. Student:

  A. Read objective sheet.

  B. Participate in discussion of objective sheet.

  C. Read information sheet.

  D. Participate in discussion of information sheet.

  E. View transparencies.

  F. Participate in explanation and demonstration of inserting, typing, and correcting a fluid master and preparation of thermal masters.

  G. Participate in explanation and demonstration of use of the fluid duplicator.

H. Read assignment sheets.

I. Complete assignment sheets.

J. Read job sheets.

K. Complete job sheets.

L. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

A. Objectives

B. Information sheet

C. Transparency masters

1. XIII-TM-1--Parts of a Fluid Duplicator
2. XIII-TM-2--Fluid Master Assembly
3. XIII-TM-3--Position of a Fluid Master in the Typewriter
4. XIII-TM-4--Correcting Master Sheet

D. Assignment sheets

1. Assignment Sheet #1--Features of Fluid Duplication
2. Assignment Sheet #2--Parts of a Fluid Duplicator

E. Answers to assignment sheets

F. Job sheets

1. Job Sheet #1--Typing a Fluid Master
2. Job Sheet #2--Running the Fluid Duplicator

G. Answers to job sheets

H. Test

I. Answers to test

II. References:

A. Books:

1. Bauer, Dennis E. and John W. Strahl. *Office Reproduction Processes*. New York, New York: Harper and Row, Publishers, Inc., 1975.

2. Gregg, John Robert and others. *Applied Secretarial Procedures*. 7th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.

3. Fasnacht, Harold and others. *How To Use Business Machines*. 3rd ed. New York, New York: McGraw-Hill Book Company, 1969.

4. Meehan, James R. and others. *Clerical Office Procedures*. 5th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

5. Meehan, James R. and others. *Secretarial Office Procedures*. 8th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

6. Pasewark, William R. *Duplicating Machine Processes: Stencil, Fluid, Offset, and Photocopy*. 2nd ed. Cincinnati, Ohio: South-Western Publishing Co., 1975.

B. Pamphlets:

1. Wiper, Robert E. and others. *Reprographics in Business Education*. Chicago, Illinois: A. B. Dick Company, 1974.

2. _____. Mimeograph and Spirit Supplies Selector. Chicago, Illinois: A. B. Dick Company, 1971.

C. Filmstrips:

1. _____. *Introduction to Business Machines*, Singer SVE, 80 Commerce Drive, Rochester, NY 14623 ($55).

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UNIT XIII

OPERATING THE FLUID DUPLICATOR

INFORMATION SHEET

I. Terms and definitions

A. Fluid Master--Three part unit consisting of a carbonized sheet of paper, a piece of tissue paper and a blank sheet of paper

B. Fluid Duplicator--Machine used to duplicate copies by means of a sheet of paper being moistened with an alcohol-like fluid as the paper enters the duplicator causing a light coating of carbon to transfer from the master sheet to a plain piece of paper

C. Thermal Masters--In the heat-transfer or thermographic procedure, the original copy is placed under a heat-sensitized sheet (a thermal master) and run through a copy machine. The image is reproduced on the sensitized paper which may be used as a master on the spirit duplicator.

II. Features of fluid duplication

A. Used when up to 200 copies are needed; 300 may be made with a well-typed master and careful operation.

B. Least expensive method of duplicating when dealing with 10 to 30 copies

C. Easy to prepare masters and easy to operate duplicator

D. Copies are not as attractive as with other methods.

E. Various colors can be duplicated.

F. Best copy paper is smooth-finished, glossy paper of any color.

G. Masters may be used again.

H. Purple dye stains your hands easily.

I. Handwriting and art work can be produced easily and quickly.

J. They are used most often for interoffice memorandums.

III. Items used in fluid duplication

   A. Master sheet

   B. Carbon sheet

   C. Copy paper

   D. Fluid

   E. Fluid Duplicator

IV. Preparing the fluid master

   A. Clean the typewriter keys.

   B. Insert master into the typewriter, open end first, so that the carbon surface faces the reverse side of the master sheet. Leave at least one-half inch blank at the top or bottom of the master to allow space for the master to be clamped onto the cylinder.

   C. Type the message on the master. Even pressure is automatic on an electric typewriter, but an even, staccato touch must be used on a manual. The carbon that is formed on the reverse side provides the dye image for duplicating.

   D. To correct errors, first eliminate the error. Lightly scrape off the unwanted carbon deposit on the reverse side of the master sheet with a razor blade or cover the error with correction tape. Insert a portion of fresh carbon paper so that it faces the reverse side of the master where the error occurred. Type your correction, remove patch of carbon, and finish typing.

   E. Proofread the master before removing it from the typewriter.

V. Operating the fluid duplicator in order to run copies

   A. Review the instructions in the operator's manual for your machine.

   B. Check the fluid supply and prime the fluid wick.

   C. Place a supply of duplicating paper in the paper tray and raise or lower the tray, as necessary.

   D. Clamp the master sheet to the drum of the machine so that the carbon side is facing up.

E. Crank the operating handle or operate the control mechanism in order to obtain several trial copies.

F. Examine trial copies to determine if the image is too light or too dark or too high or too low. Make any adjustments that will improve the clarity of the copy and run several more trial copies.

G. When a clear, legible copy is obtained, proceed with the run.

H. As copies are run, check to see that each copy is of a uniform, good quality.

I. When you have completed the run, remove the master from the drum, clean the machine and working area, and return unused supplies to the storage cabinets.

VI. Parts of the fluid duplicator

A. Clamp Control--The adjustment control that closes and opens the locking device which keeps the master against the drum

B. Counter--A dial which when preset controls the number of copies produced

C. Drum or Cylinder--Part of machine on which the master is attached

D. Feed Control--The adjustment control that sets the pressure of the rollers to allow the duplicator to handle several weights of paper

E. Feed Rollers--Wheels which rest on top of the copy paper as it is fed into the machine

F. Feed Tray--Tray which holds 50-300 sheets of copy paper and facilitates the automatic feeding of the copy paper into the machine

G. Fluid Tank--Container which holds the liquid that moistens the copy paper as it is fed into the machine

H. Impression Control--Lever which controls the flow of fluid into the machine causing darker or lighter copies.

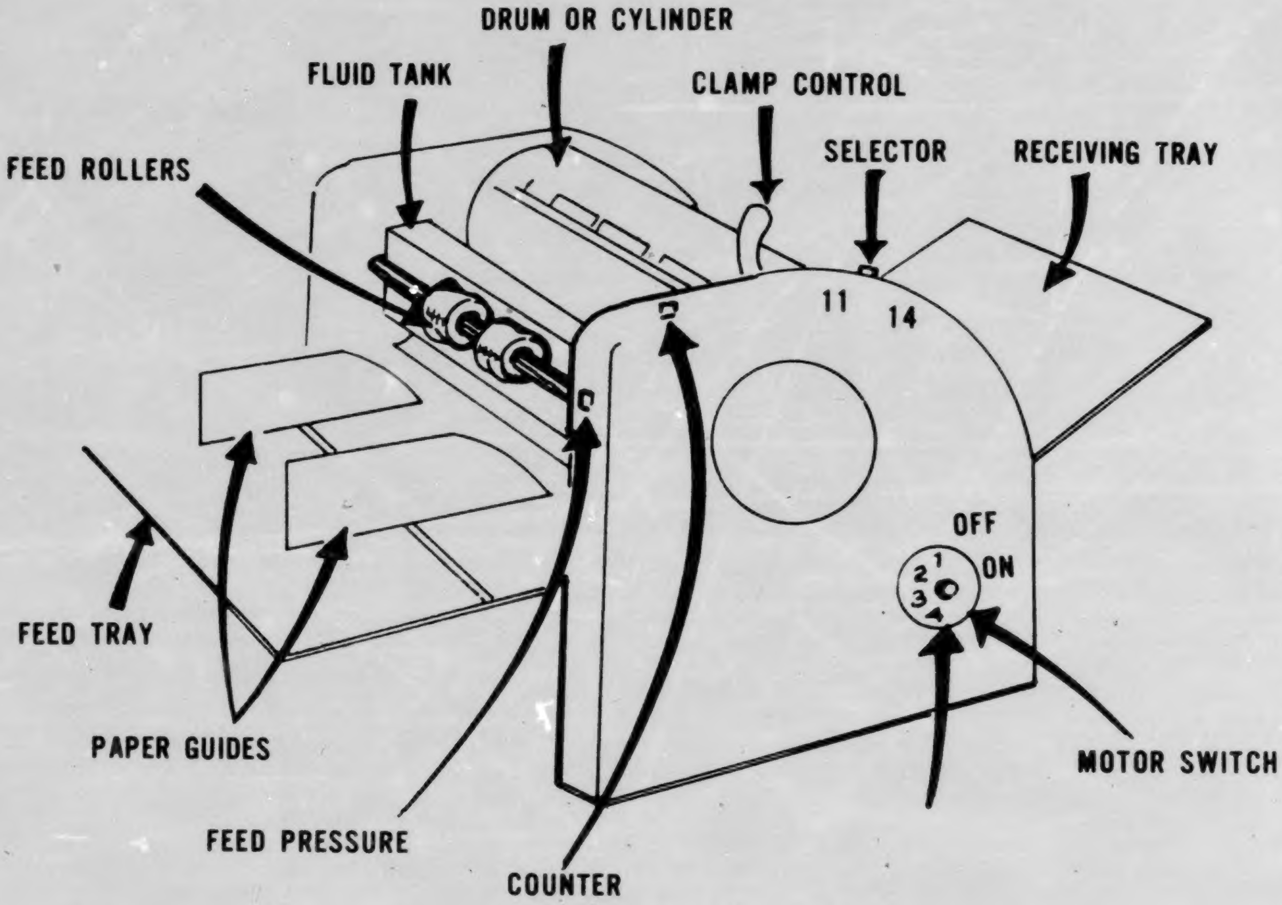
I. Motor Switch--Lever which controls the electricity flow to the motor

J. Paper Guides--Guides on the feed tray which aid the operator in positioning the copy paper horizontally

K. Receiving Tray--Tray in which the finished copy is automatically stacked

L. Selector--The adjustment control which sets the machine for eleven or fourteen inch length paper

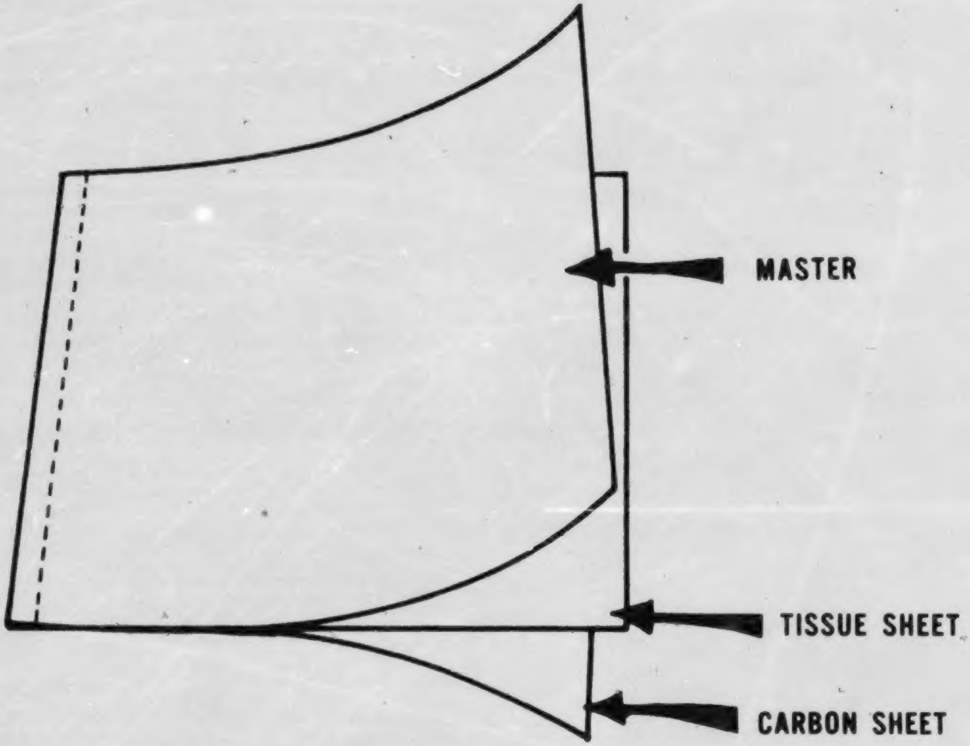
PARTS OF A FLUID DUPLICATOR



14.0303-XIII-TM-1

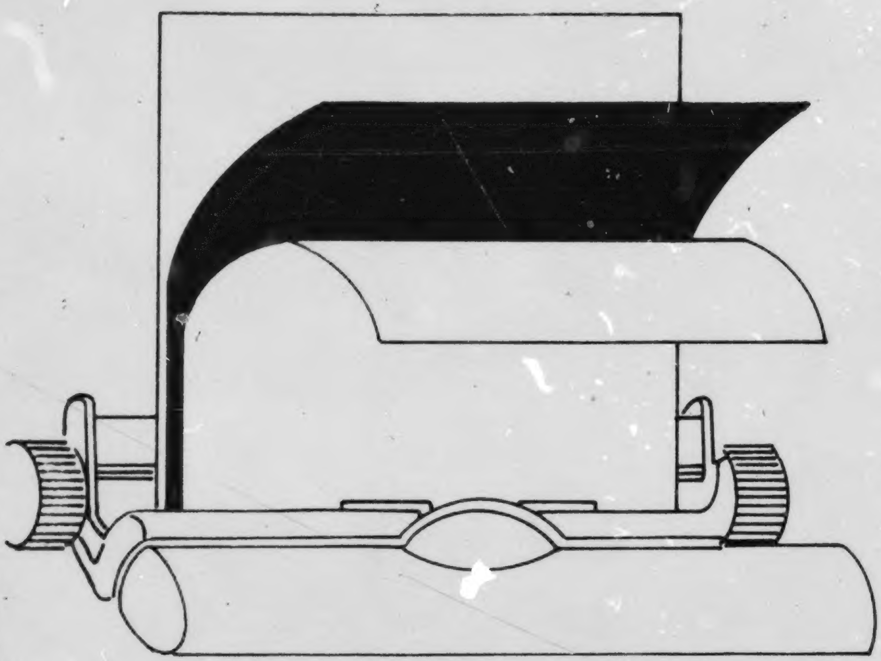
XIII-539

THE FLUID MASTER SET



14.0303-XIII-TM-2

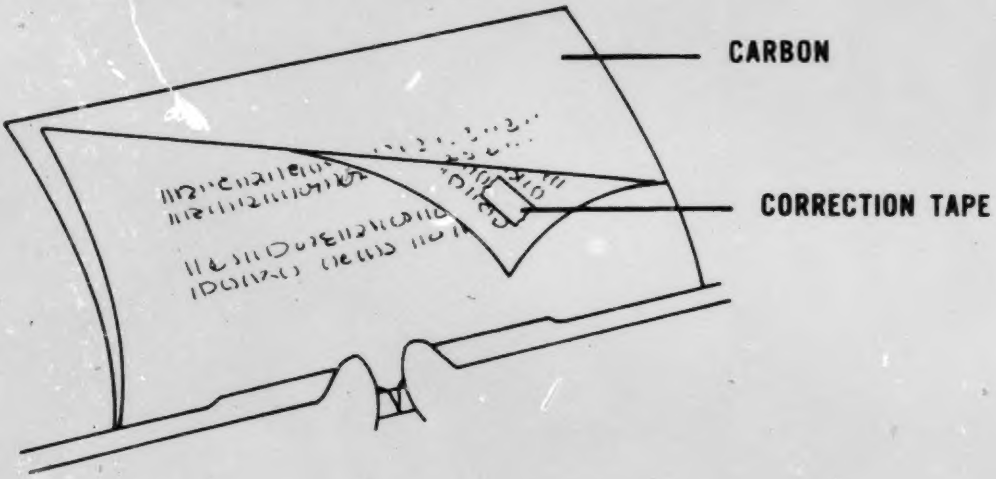
MASTER POSITION IN TYPEWRITER



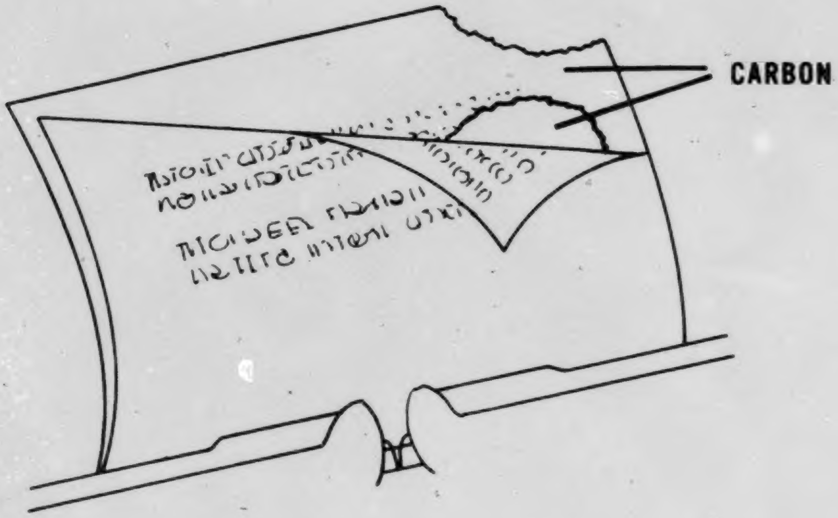
14.0303-XIII-TM-3

XIII-543

CORRECTING MASTER SHEET



REMOVING ERROR ONLY



REMOVING ERROR AND REPLACING A LETTER

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UNIT XIII

OPERATING THE FLUID DUPLICATOR

ASSIGNMENT SHEET #1--FEATURES OF FLUID DUPLICATION

Directions: Assume you are the executive secretary to Mr. D. S. Tate, the office supervisor of the Jonesboro Branch of Leslie Carpet Manufacturers. In order to inform the employees of the Christmas holiday dates, he wants you to help him with an attractive interoffice memorandum to send the heads of each department in the office. The departments are: Billing, Purchasing, Accounts Payable, Accounts Receivable, Payroll, Personnel, Inventory, and Data Processing. This memorandum is to be posted on each department bulletin board after the department head has read it.

A. Discuss steps you might use to carry out this task. Then make a rough draft of the memo giving all pertinent information. Include art work to make the memo more attractive.

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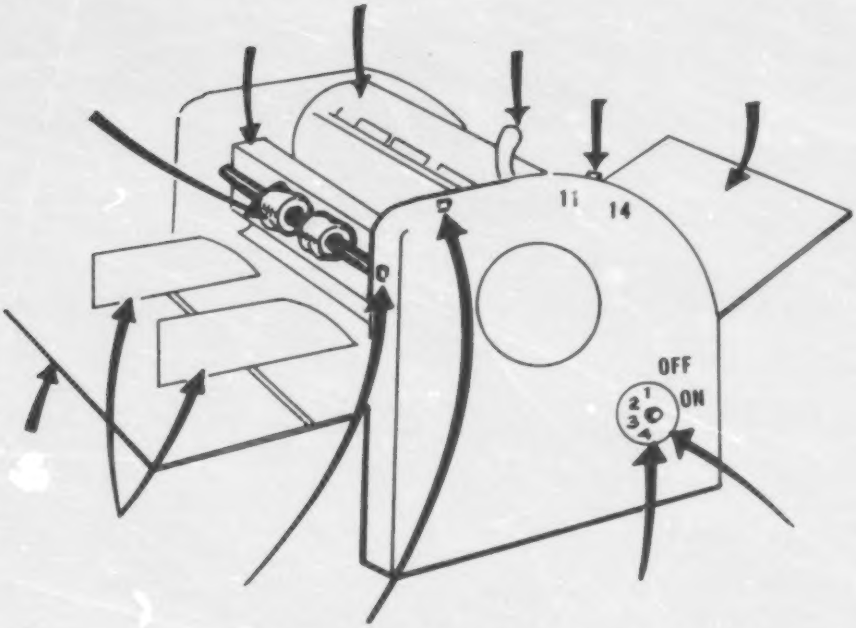
UNIT XIII

OPERATING THE FLUID DUPLICATOR

ASSIGNMENT SHEET #2--PARTS OF A FLUID DUPLICATOR

Directions: Match the parts of the fluid duplicator pictured with the words listed below.

a. Impression control
b. Receiving tray
c. Paper guides
d. Drum or cylinder
e. Fluid tank
f. Feed rollers
g. Motor switch
h. Clamp control
i. Feed tray
j. Counter
k. Feed pressure
l. Selector



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UNIT XIII

OPERATING THE FLUID DUPLICATOR

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

A. First write up a rough draft of the memorandum letting the departments know the exact dates of the Christmas holidays. Example: On December 23, 1976 at 12 noon, the Jonesboro Branch Office of Leslie Carpet Manufacturers will close for the Christmas holidays. The office will re-open on December 27, 1976, at 8 A.M. The holidays will be for 3 1/2 days, December 23 - December 26, inclusive.

Also, be sure to request that the memorandum be posted on the department bulletin board for employee notification.

A Christmas greeting or thought might be added as well as a safety note.

A drawing depicting some part of Christmas might also be used.

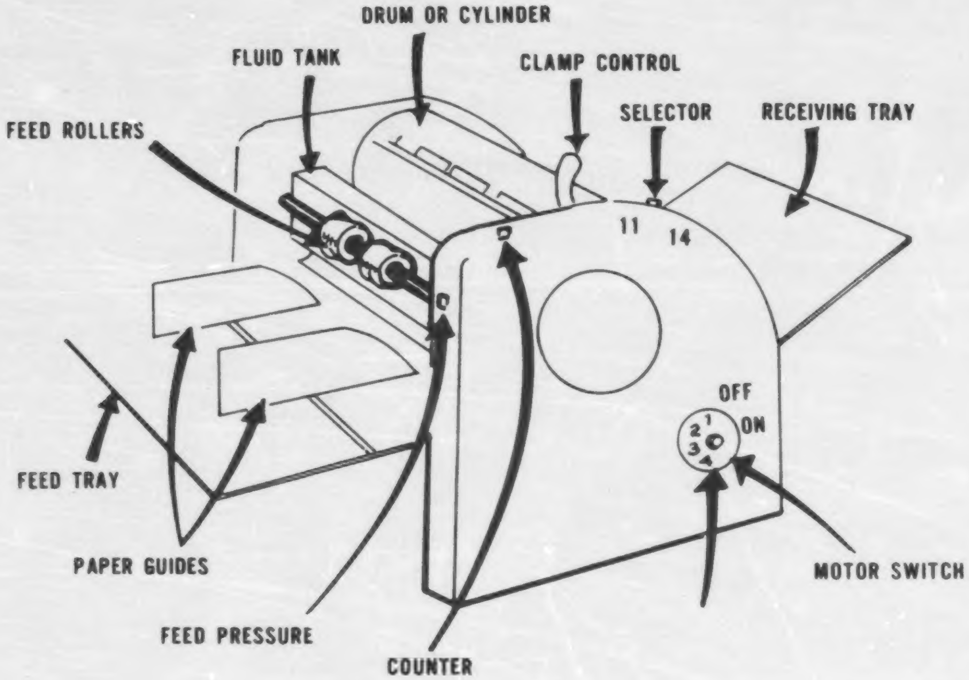
B. Fluid duplicating would be the best because there are eight departments to be informed and this type of reproduction is used most often within offices.

Because fluid masters come in several colors, green or red might be used to add to the Christmas theme of the memorandum.

Other reasons for using the fluid master are art work can be produced easily and quickly, expense is small, and masters are easy to prepare and duplicate.

Assignment Sheet #2

PARTS OF A FLUID DUPLICATOR



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UNIT XIII

OPERATING THE FLUID DUPLICATOR

JOB SHEET #1--TYPING A FLUID MASTER

I. Tools and equipment needed:

   A. Typewriter

   B. Typewriter cleaning supplies

   C. Fluid master

   D. Handouts

   E. Razor blade or correction tape

   F. Sharp pencil or ball-point pen

II. Job procedures:

Assume you are employed as a typist and one of your routine tasks is to type fluid masters. Select any one of the available handouts and type a fluid master from it. Be sure to consider all points in preparing a fluid master.

(NOTE: Additional handouts should be provided by the instructor.)

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UNIT XIII

OPERATING THE FLUID DUPLICATOR

JOB SHEET #1 HANDOUT

Do you irritate your co-workers? If you have any of the following negative habits, you probably do. Ask a close friend to check you against the following list--and you do the same for your friend. Then make a sincere effort to eliminate any that you do--even occasionally.

1. Drumming or tapping with fingers, toes, or a pencil
2. Humming or whistling under your breath
3. Sniffling or snorting
4. Breathing noisily
5. Blowing your nose noisily
6. Clearing your throat with a rasp
7. Sucking your teeth
8. Coughing or sneezing without turning your face and covering your mouth with a handkerchief
9. Coughing loudly
10. Fussing with your hair
11. Playing with rings, beads, belt, or the like unnecessarily
12. Adjusting your collar, cuffs, belt, unnecessarily
13. Scratching your hair or picking at your face
14. Chewing gum
15. Yawning
16. Back slapping
17. Whispering
18. Drawing designs in your notebook as you wait for dictation
19. Wrinkling your brows

20. Slamming doors

21. Banging telephone receivers

22. Dashing in and out of rooms

To eliminate an undesirable habit: (1) be conscious that you possess it, (2) honestly desire to get rid of it, and (3) stop it now and permit no recurrence.

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UNIT XIII

OPERATING THE FLUID DUPLICATOR

JOB SHEET #2--RUNNING THE FLUID DUPLICATOR

I. Tools and equipment needed:

   A. Fluid duplicator

   B. Fluid master

   C. Copy paper

   D. Ink

II. Job procedures:

Make copies of the master typed in Job Sheet #1 using the fluid duplicator machine.

(NOTE: The number of copies is left up to the discretion to the teacher.)

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UNIT XIII

OPERATING THE FLUID DUPLICATOR

ANSWERS TO JOB SHEETS

Job Sheet #1

The handout should be typed to the satisfaction of the instructor.

Job Sheet #2

The fluid master should be reproduced to the satisfaction of the instructor.

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UNIT XIII

OPERATING THE FLUID DUPLICATOR

UNIT TEST

1. Define the following terms:

   a. Fluid duplicator

   b. Fluid master

2. Identify the features of fluid duplication by placing an "X" by the appropriate statements. Place a dash (-) by those statements which do not apply to fluid duplication.

_____ a. It is easy to prepare a master and operate the duplicator.

_____ b. When compared to stencil duplication, copies are of better quality.

_____ c. When compared to offset duplication, copies are of poorer quality.

_____ d. This is the least expensive process when dealing with 10 to 30 copies.

_____ e. Handwriting and art work can be traced onto the master or manufactured insets may be used.

_____ f. They are used most often for interoffice memorandums.

_____ g. It can be used to reproduce color.

_____ h. Several colors can be duplicated.

_____ i. They are printed best on finished, dull paper of any color.

_____ j. They are used when up to 500 copies are needed.

_____ k. They can be stored and used again when more copies of that item are needed.

3. Name the five elements of fluid duplication.

   a.

   b.

   c.

   d.

   e.

4. Explain how to prepare a fluid master.

5. Match the names of the parts of the fluid duplicator to their descriptions. Place the correct letters in the blank next to the correct number.

_____ 1. Feed control

_____ 2. Selector

_____ 3. Paper Guides

_____ 4. Clamp control

_____ 5. Drum or cylinder

_____ 6. Feed rollers

_____ 7. Receiving tray

_____ 8. Fluid tank

_____ 9. Feed tray

_____ 10. Counter

_____ 11. Impression control

_____ 12. Motor switch

a. The adjustment control which sets the machine for eleven or fourteen inch length paper

b. Tray in which the finished copy is automatically stacked

c. Guides on the feed tray which aid the operator in positioning the copy paper horizontally

d. Lever which controls the electricity flow to the motor

e. Lever which controls the flow of fluid into the machine causing darker or lighter copies

f. Container which holds the liquid that moistens the wick which moistens the copy paper as it is fed into the machine

g. Tray which holds 50 to 300 sheets of copy paper and facilitates the automatic feeding of the copy paper into the machine

h. Wheels which rest on top of the copy paper as it is fed into the machine

i. The adjustment control that sets the pressure of the rollers to allow the duplicator to handle several weights of paper

j. Part of the machine on which the master is attached

k. A dial, which when preset, controls the number of copies produced

l. The adjustment control that closes and opens the locking device which keeps the master against the drum

6. Discuss the process of operating the fluid duplicator.

7. Demonstrate the ability to:

   a. Type a fluid master.

   b. Run a fluid master.

   (NOTE: If the skills have not been accomplished prior to the test, ask the instructor when they should be completed.)

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UNIT XIII

OPERATING THE FLUID DUPLICATOR

ANSWERS TO UNIT TEST

1. a. Fluid duplicator--A machine used to duplicate copies by means of a sheet of paper being moistened with an alcohol-like fluid as the paper enters the duplicator, causing a light coating of carbon to transfer from the master sheet to a plain piece of paper.

   b. Fluid master--Three part unit consisting of a carbonized sheet of paper, a piece of tissue paper and a blank sheet of paper

2. __x__ a.

   __-__ b.

   __x__ c.

   __x__ d.

   __-__ e.

   __x__ f.

   __x__ g.

   __x__ h.

   __-__ i.

   __-__ j.

   __x__ k.

3. a. Master sheet

   b. Carbon sheet

   c. Copy paper

   d Fluid

   e. Fluid duplicator

4. a. Clean typewriter keys.

   b. Insert master into typewriter, open end first, so that the carbon surface faces the reverse side of the master sheet. Leave at least one-half inch blank at the top or bottom of the master to allow space for the master to be clamped on to the cylinder.

   c. Type the message on the master. Even pressure is automatic on an electric typewriter, but an even, staccato touch must be used on a manual. The carbon that is formed on the reverse side provides the dye image for duplicating.

   d. To correct errors, first eliminate the error. Lightly scrape off the unwanted carbon deposit on the reverse side of the master sheet with a razor blade or cover the error with correction tape. Insert a portion of fresh carbon paper so that it faces the reverse side of the master where the error occurred. Type your correction, remove patch, and finish typing.

   e. Proofread the master before removing it from the typewriter.

5. i 1.

   a 2.

   c 3.

   l 4.

   j 5.

   h 6.

   b 7.

   f 8.

   g 9.

   k 10.

   e 11.

   d 12.

6. Review the instructions in the operator's manual for your machine. Check the fluid supply and prime the fluid wick. Place a supply of duplicating paper in the paper tray and raise or lower the tray, as necessary. Clamp the master sheet to the drum of the machine so that the carbon side

is facing up. Crank the operating handle or operate the control mechanism in order to obtain several trial copies. Examine the trial copies to determine if the image is too light or too dark. Make any adjustments that will improve the clarity of the copy and run several more trial copies. When a clear, legible copy is obtained, set copy counter and proceed with the run. As copies are run, check to see that each copy is of a uniform, good quality. When you have completed the run, remove the master from the drum, clean the machine and working area, and return unused supplies to the storage cabinets.

7. Evaluated to the satisfaction of the instructor.

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UNIT XIV

OPERATING THE STENCIL DUPLICATOR

TERMINAL OBJECTIVE

After completion of this unit, the student will be able to identify the parts of a stencil; type legible, uniform stencils; use an illuminated drawing board (mimeoscope) to produce artistic work on a stencil; and operate the mimeograph machine (stencil duplicator) efficiently. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student will be able to:

1. Define terms associated with stencil duplication.
2. Identify features of stencil duplication.
3. Name the four items used in stencil duplication.
4. Identify and define the types of styli.
5. Cite the steps on how to prepare stencils for duplication.
6. Match the names to the descriptions of the parts of the stencil duplicator.
7. Discuss the process of operating the stencil duplicator.
8. Demonstrate the ability to:
    a. Type a stencil.
    b. Use a stylus.
    c. Run the stencil duplicator.

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UNIT XIV

OPERATING THE STENCIL DUPLICATOR

SUGGESTED ACTIVITIES

I. Instructor:

  A. Provide objective sheet.

  B. Discuss objective sheet.

  C. Provide information sheet.

  D. Discuss information sheet.

  E. Make transparencies.

  F. Explain and demonstrate inserting, typing, and correcting a stencil and preparing stencils on automatic stencil-makers and copiers.

  G. Explain and demonstrate drawing, lettering, and shading a stencil.

  H. Explain and demonstrate use of the stencil duplicator or mimeograph.

  I. Provide assignment sheets.

  J. Discuss assignment sheets.

  K. Provide job sheets.

  L. Discuss job sheets.

  M. Provide additional jobs in applicable exercise papers.

  N. Discuss additional jobs in applicable exercise papers.

  O. Give test and evaluate results.

II. Student:

  A. Read objective sheet.

  B. Participate in discussion of objective sheet.

  C. Read information sheet.

  D. Participate in discussion of information sheet.

E. View transparencies.

F. Participate in explanation and demonstration on inserting, typing, and correcting a stencil and preparing stencils on automatic stencil-makers and copiers.

G. Participate in explanation and demonstration of drawing, lettering, and shading a stencil.

H. Participate in explanation and demonstration of the use of the stencil duplicator or mimeograph.

I. Read assignment sheets.

J. Complete assignment sheets.

K. Read job sheets.

L. Complete job sheets.

M. Read additional jobs in applicable exercise papers.

N. Complete additional jobs in applicable exercise papers.

O. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

A. Objectives

B. Information sheet

C. Transparency masters

1. XIV-TM-1--The Stencil Assembly
2. XIV-TM-2--Stencil Guide Marks
3. XIV-TM-3--Screen Plates
4. XIV-TM-4--Types of Illuminated Drawing Boards
5. XIV-TM-5--Types of Styli
6. XIV-TM-6--The Stencil Duplicator
7. XIV-TM-7--Correcting Stencil

D. Assignment sheets

  1. Assignment Sheet #1--Identifying Stencilization Materials

  2. Assignment Sheet #2--Determining Incorrect Procedures

E. Answers to assignment sheets

F. Job sheets

  1. Job Sheet #1--Typing a Stencil

  2. Job Sheet #2--Using a Stylus

  3. Job Sheet #3--Running the Stencil Duplicator

G. Answers to job sheets

H. Additional jobs in applicable exercise papers

I. Answers to additional jobs in applicable exercise papers

J. Test

K. Answers to test

II. References:

A. Bauer, Dennis E. and John W. Strahl. Office Reproduction Processes. New York, New York: Harper and Row Publishers, Inc., 1975.

B. Gregg, John Robert and others. Applied Secretarial Procedures. 7th ed. Cincinnati, Ohio: South-Western Publishing Company, 1974.

C. Fasnacht, Harold and others. How to Use Business Machines. 3rd ed. New York, New York: Gregg Division, McGraw-Hill Book Company, 1969.

D. ________. Mimeograph and Spirit Supplies Selector. Chicago, Illinois: A. B. Dick Company, 1971.

E. Meehan, James R. and others. Clerical Office Procedures. 5th ed. Cincinnati, Ohio: South-Western Publishing Company, 1973.

F. Meehan, James R. and others. Secretarial Office Procedures. 8th ed. Cincinnati, Ohio: South-Western Publishing Company, 1972.

G. Pasewark, William R. Duplicating Machine Processes: Stencil, Fluid, Offset, and Photocopy. 2nd ed. Cincinnati, Ohio: South-Western Publishing Co., 1971.

H. Wiper, Robert E. and others. Reprographics in Business Education. Chicago, Illinois: A. B. Dick Company, 1974.

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UNIT XIV

OPERATING THE STENCIL DUPLICATOR

INFORMATION SHEET

I. Terms and definitions

  A. Stencil--A thin fibrous tissue paper coated with a wax substance which, when pushed aside by a typewriter key or stylus, allows ink to pass through to a surface to be printed

  B. Stencil duplication--The flow of ink through stencilized openings to the copy paper

  C. Illuminated drawing board (scope)--A frame or box holding a translucent glass lighted from beneath

  D. Burnisher--Any smooth, rounded object that can be used to lightly rub an error in a circular motion to return some of the stencil coating to the stencilized area

  E. Stencil correction fluid--A chemical compound similar to the stencil coating

  F. Stylus--A sharply pointed instrument used to write or draw on a stencil

  G. Flexible writing plate--A translucent sheet of grained plastic used instead of the cushion sheet when drawing or tracing

  H. Screen plate--A transparent plastic used to create shaded areas on pictures and illustrations already traced on a stencil

  I. Letter guides--Plastic guides containing letter and number styles used in tracing letters and numbers on a stencil

II. Features of stencil duplication

  A. Used when 50 - 10,000 copies are needed

  B. Are inexpensive for long runs

  C. Are easy to read

- D. Compared with the fluid duplicator, copies are of higher quality; compared with the offset duplicator, copies are of lesser quality.
- E. Relatively easy to cut stencils and run copies
- F. Hand-drawn illustrations or manufactured insets may be used.
- G. Reproduces color
- H. Can be stored and used again
- I. Uses absorbent, rough finished paper of any color

III. Items used in stencil duplication

- A. Stencil
- B. Ink
- C. Copy paper
- D. Stencil duplicator

IV. Types of styli

- A. Wire-loop stylus--A wire-loop stylus is the best for ruling or drawing. Keep the thinnest part of the stylus parallel to the line being drawn.
- B. Ball-point stylus--A ball-point stylus is best for fine detail. Use it as you would a pen.
- C. Wheel stylus--A wheel stylus comes in several patterns. It is used for drawing solid and broken lines. It must be kept parallel to the line being drawn when in use.
- D. Roll-point stylus--A roll-point stylus is used for writing, signatures, and freehand drawing. When being used, it should be held almost vertically, with very firm, even pressure.

V. Preparing stencils

- A. Cutting an original
  - 1. Assemble supplies
    - a. Cleaning fluid, brush, or gum
    - b. Guide copy paper--exact model on paper of how the duplicated copy should look

2. Stencil assembly
    a. Cellophane film
    b. Stencil sheet
    c. Cushion sheet
    d. Backing sheet
3. Plan arrangement of material.
    a. All copy should be kept one-half inch inside of stencil margins. (For 8 1/2 x 11 inch paper, do not type past vertical line 62. For 8 1/2 x 14 inch paper, do not type past line 75.)
    b. The vertical line at center is to assist in centering material horizontally.
4. Prepare the typewriter.
    a. Set ribbon indicator in the stencil position.
    b. Clean typewriter keys.
    c. Type a few lines on scratch paper to insure that keys are free of ink.
    d. Set machine margins.
5. Cut the stencil.
    a. Insert assembled stencil pack into typewriter with backing sheet next to platen.
    b. Move paper bail rollers outside the reproduction area to prevent wrinkling of stencil.
    c. Type stencil from the guide copy.
6. Correct errors.
    a. Roll up platen so error is exposed.
    b. Pull away cellophane film.
    c. Burnish error.
    d. Apply correction fluid.
    e. After fluid is dry, type correction.

7. Proofread stencil before removing from typewriter.
8. Drawing, lettering, and shading illustrations on a mimeoscope
    a. Remove cushion sheet and put stencil assembly on illuminated drawing board.
    b. Place guide copy beneath stencil sheet.
    c. Place a flexible writing plate between the guide copy and the stencil unit.
    d. Secure stencil to drawing board.
    e. Cut the stencil using a stylus with or without screen plates or lettering guides.

B. Automatic stencil preparation using a stencil-maker machine or copy machine

NOTE: These instructions are for use with an A. B. Dick, Model 580, Stencil Maker.

1. Turn on machine and let warm 30 seconds.
2. Attach original, error-free copy.
3. Attach stencil.
4. Press start button.
5. When stencil is imaged, turn off machine.

VI. Parts of the stencil duplicator

A. Brake--The lever which adjusts the ink drum so that it cannot be turned

B. Angular adjustment--The lever which aids in horizontal positioning of the copy

C. Copy counter--Counter, which when preset, determines the number of copies which the machine will make

D. Feed roll pressure--The adjustment control that sets the pressure of the rollers to allow the duplicator to handle papers of different weights

E. Feed controls--The feed table elevating knob which raises the paper to the feed rollers; the feed lowering knob which lowers the feed table; feed rollers which draw paper into the machine; and the feed control lever which engages the feed rollers

F. Guide rail--Guides on the feed tray which hold the copy paper in place

G. Guide rail knob--Lever which adjusts the guide rails for different sizes of paper

H. Head clamp--Control which holds the stencil against the drum

I. Hand wheel--Control which is turned to manually feed the paper through the machine

J. Ink measuring rod--A measuring rod which aids the operator in determining the level of ink in the duplicator

K. Lateral adjustment--Control which aids the horizontal centering of the feed table by moving it to the right or to the left

L. Motor switch--Lever which controls the electricity flow to the motor

M. Paper corner separator--Device which separates the copy paper so that only one sheet feeds into the machine with each complete revolution of the machine

N. Receiving tray--Tray in which the finished copy is automatically stacked

VII. Process of operating the mimeograph or stencil duplicator

A. Review the instructions of the operator's manual for your machine.

B. Remove the machine cover and release the brake by moving the control to "off" position.

C. Check ink supply.

D. Remove the protective cover from the ink pad around drum by releasing the clamps that hold it in place. (NOTE: Do not throw it away.)

E. Remove the stencil film sheet and cushion sheet from the stencil and put the stencil on the drum face down by closing the head clamp and then tearing off the stencil backing sheet.

F. Install a supply of duplicating paper on the feed table; adjust the paper guides; and raise the paper by turning the Feed Table Elevating Knob until the paper is within one-half inch of the Feed Rollers.

G. Crank the operating handle or operate the control mechanism in order to obtain several trial copies.

H. Make the adjustments necessary to position the copy paper correctly and to ink the copy evenly.

I. Set the copy counter for the number of copies the machine is to produce before it stops.

J. Activate the power switch or crank the machine until all copies required are run.

K. Shut off power or stop the cranking of the machine.

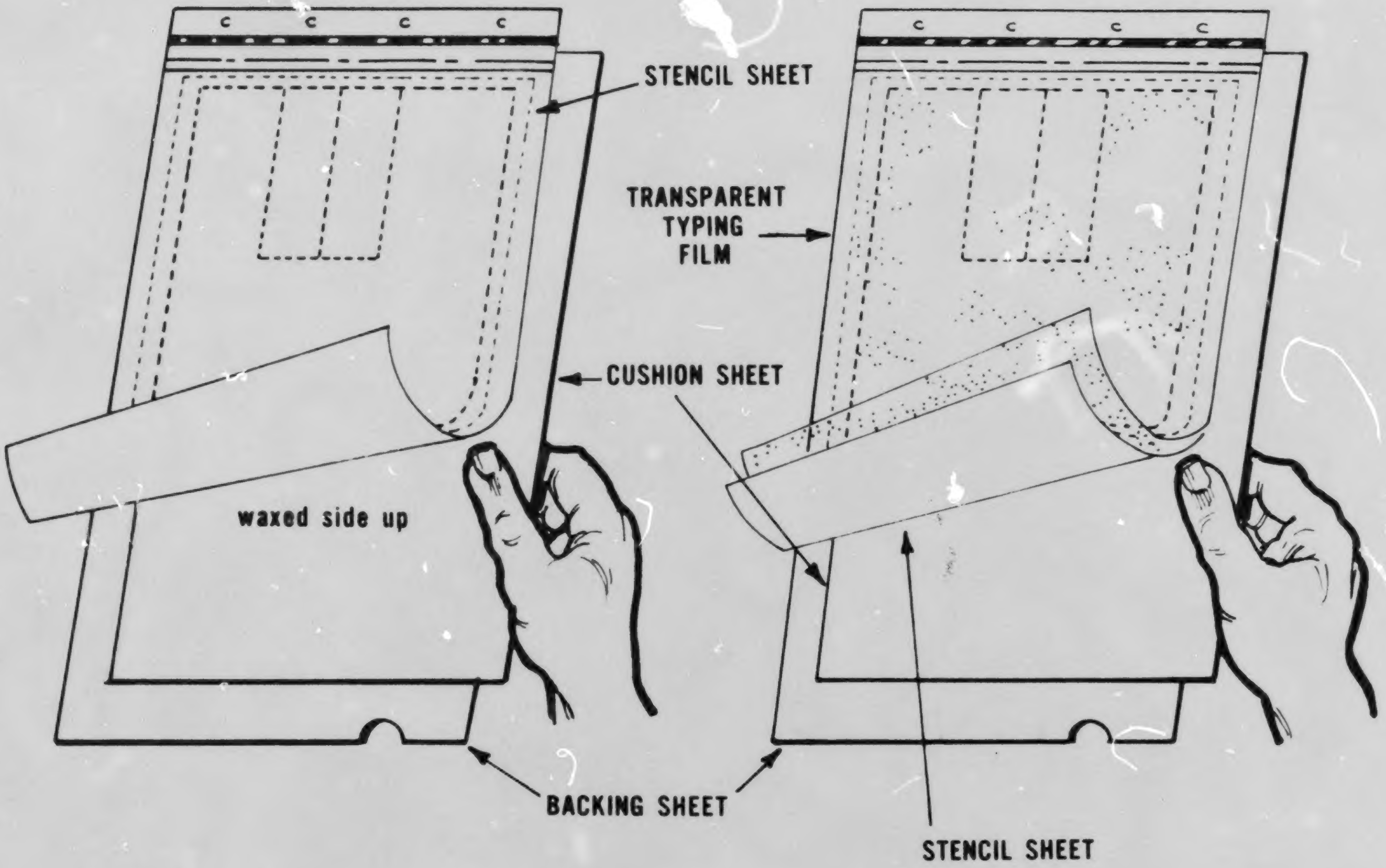
L. Remove the stencil from the drum by carefully raising the loose end away from the drum and releasing the head clamp.

M. Place the stencil in a stencil folder for storage and attach a copy of the completed run on the outside of the folder.

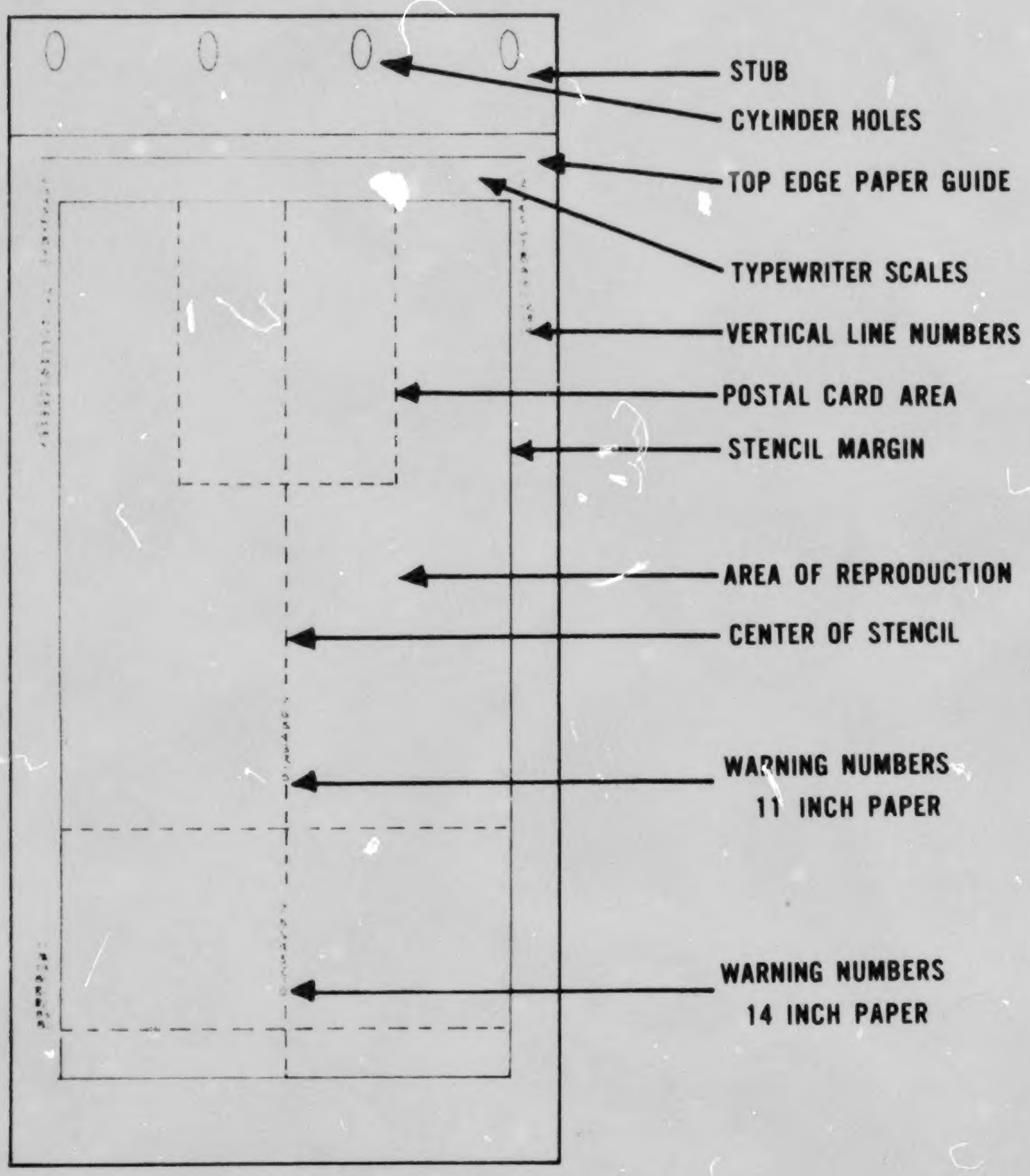
N. Clean the machine and the working area by replacing the protective cover over the ink pad and returning the unused supplies to the storage cabinets.

O. Set the brake in the "on" position.

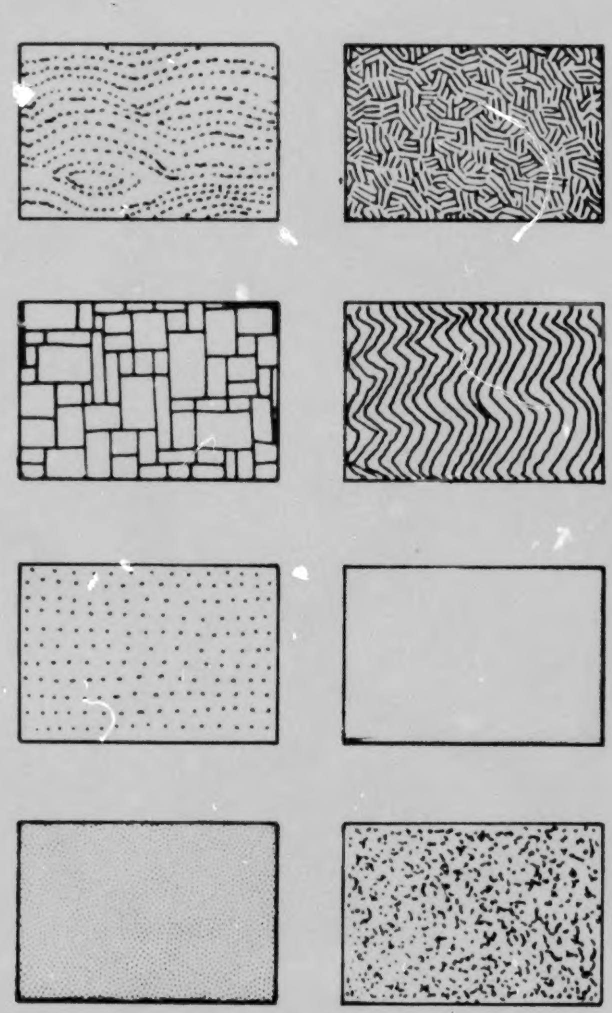
STENCIL ASSEMBLY



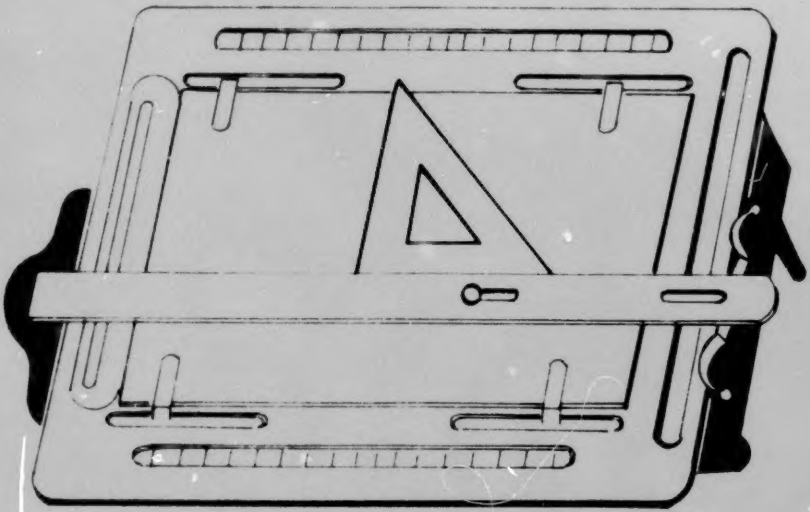
STENCIL GUIDE MARKS

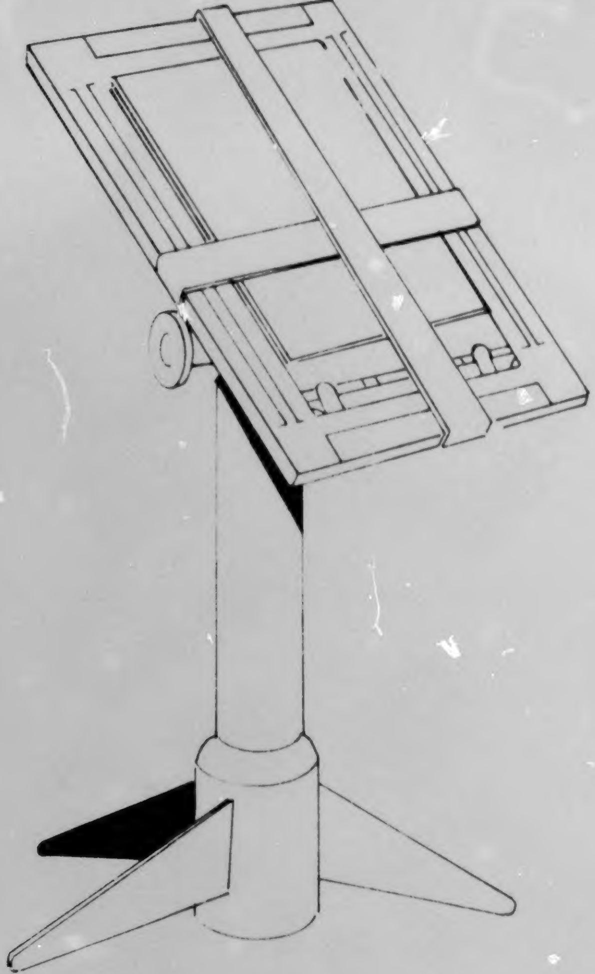


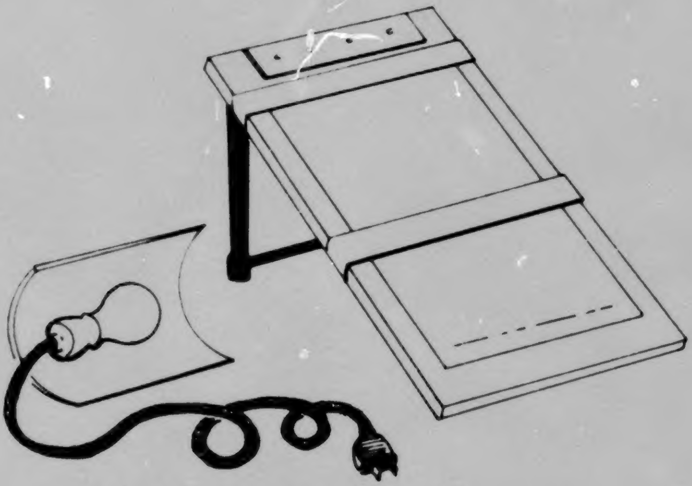
TYPES OF SCREEN PLATES



ILLUMINATED DRAWING BOARDS







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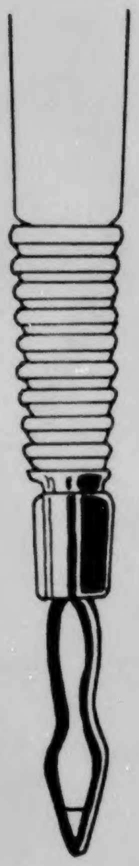
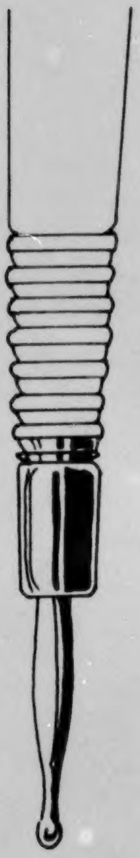
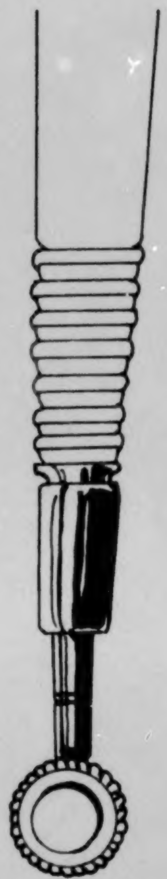
TYPES OF STYLI



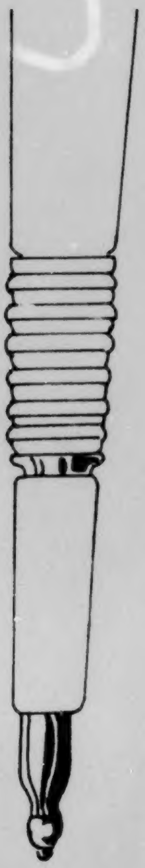
WIRE-LOOP



BALL POINT

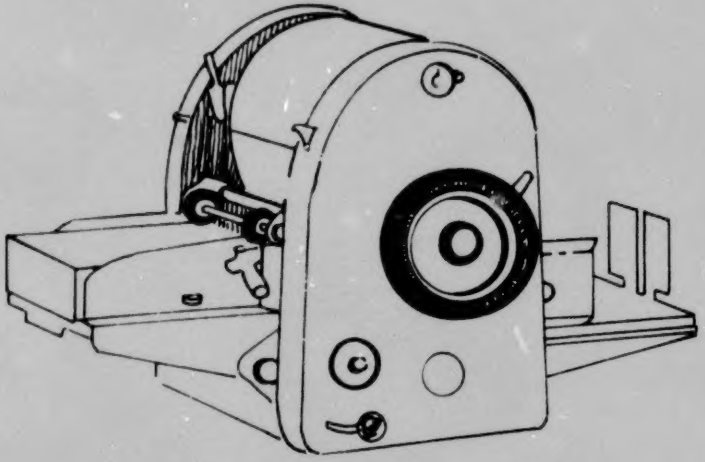


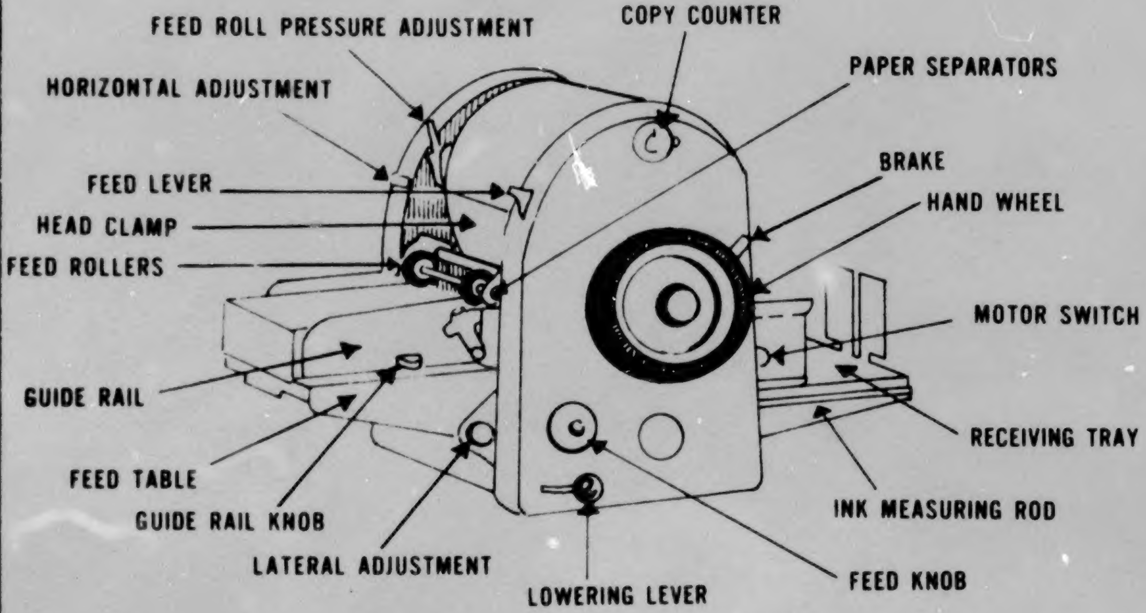
WHEEL



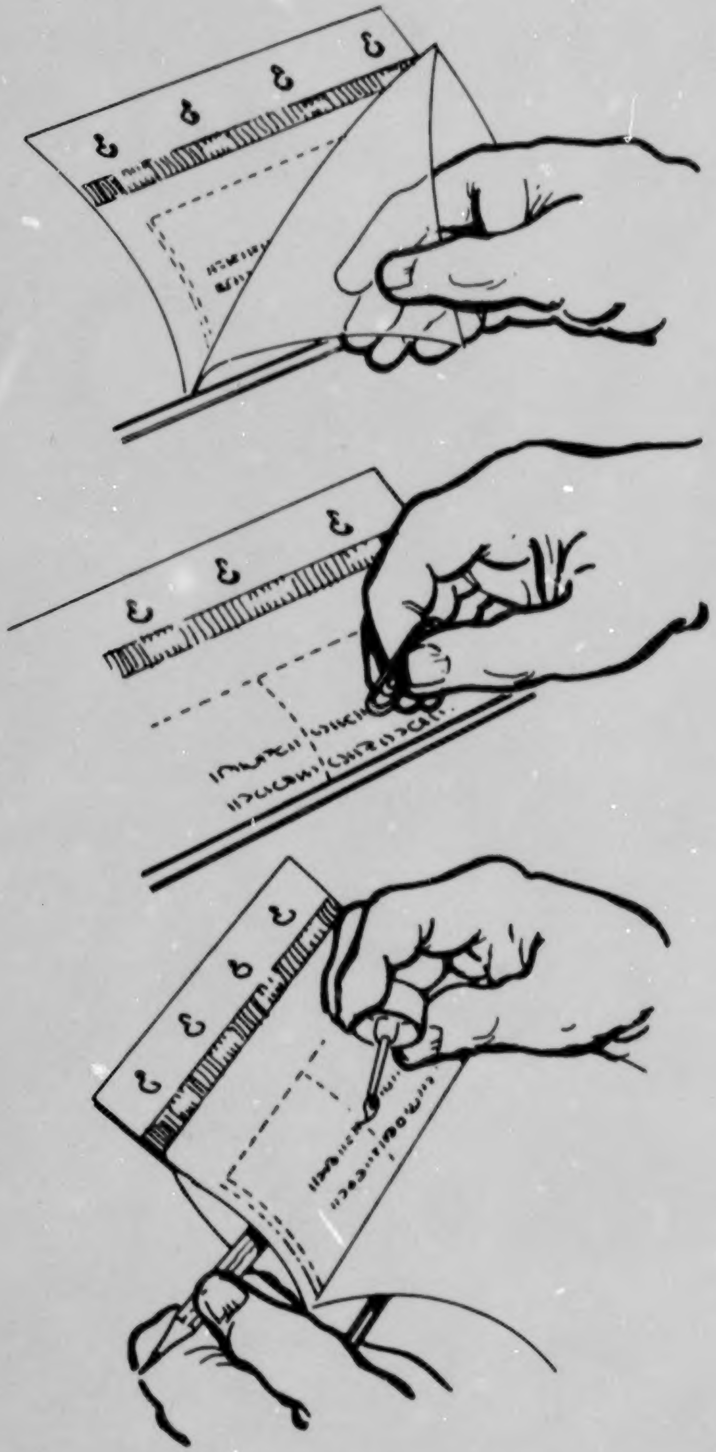
ROLL-POINT

STENCIL DUPLICATOR





CORRECTING STENCIL



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UNIT XIV

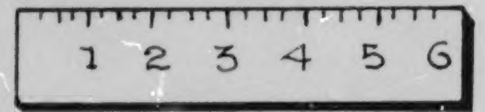
OPERATING THE STENCIL DUPLICATOR

ASSIGNMENT SHEET #1--IDENTIFYING STENCILIZATION MATERIALS

Directions: Look at the various items shown on the following page. Which ones might apply to stencil duplication and which ones would not be needed? Make a list of those items you might need for stencil duplication.

LIST OF ITEMS NEEDED FOR STENCILIZATION

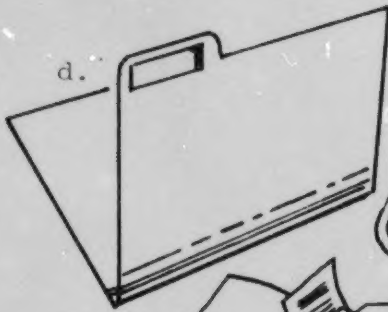
a.



b.

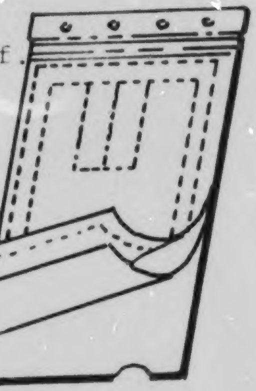
c.

d.

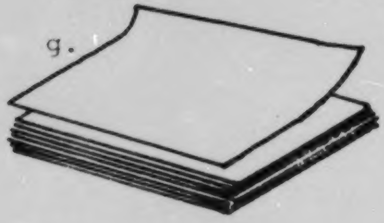


e.

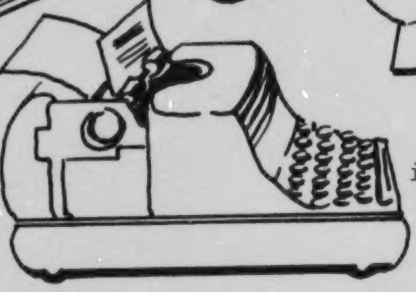
f.



g.

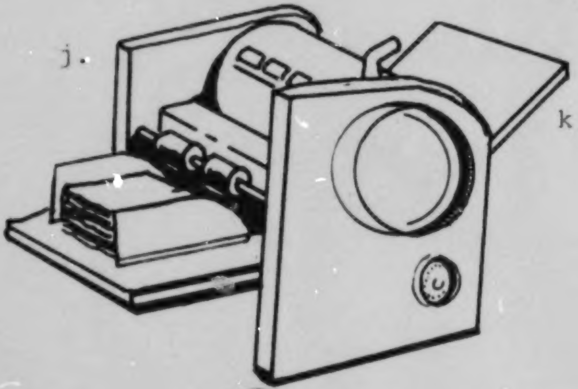


h.



i.

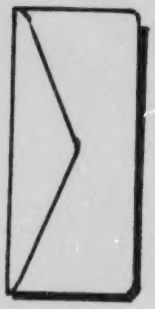
j.



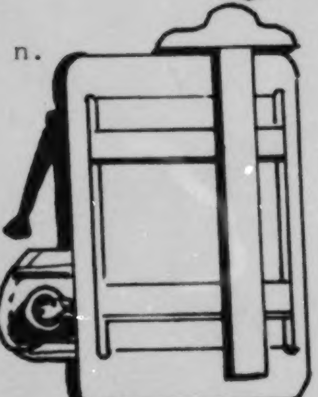
k.

l.

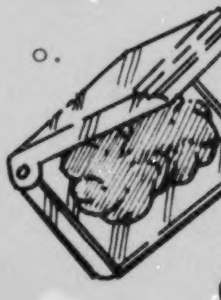
m.



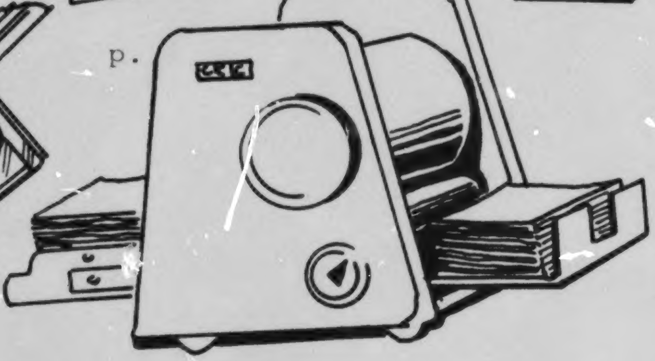
n.



o.



p.



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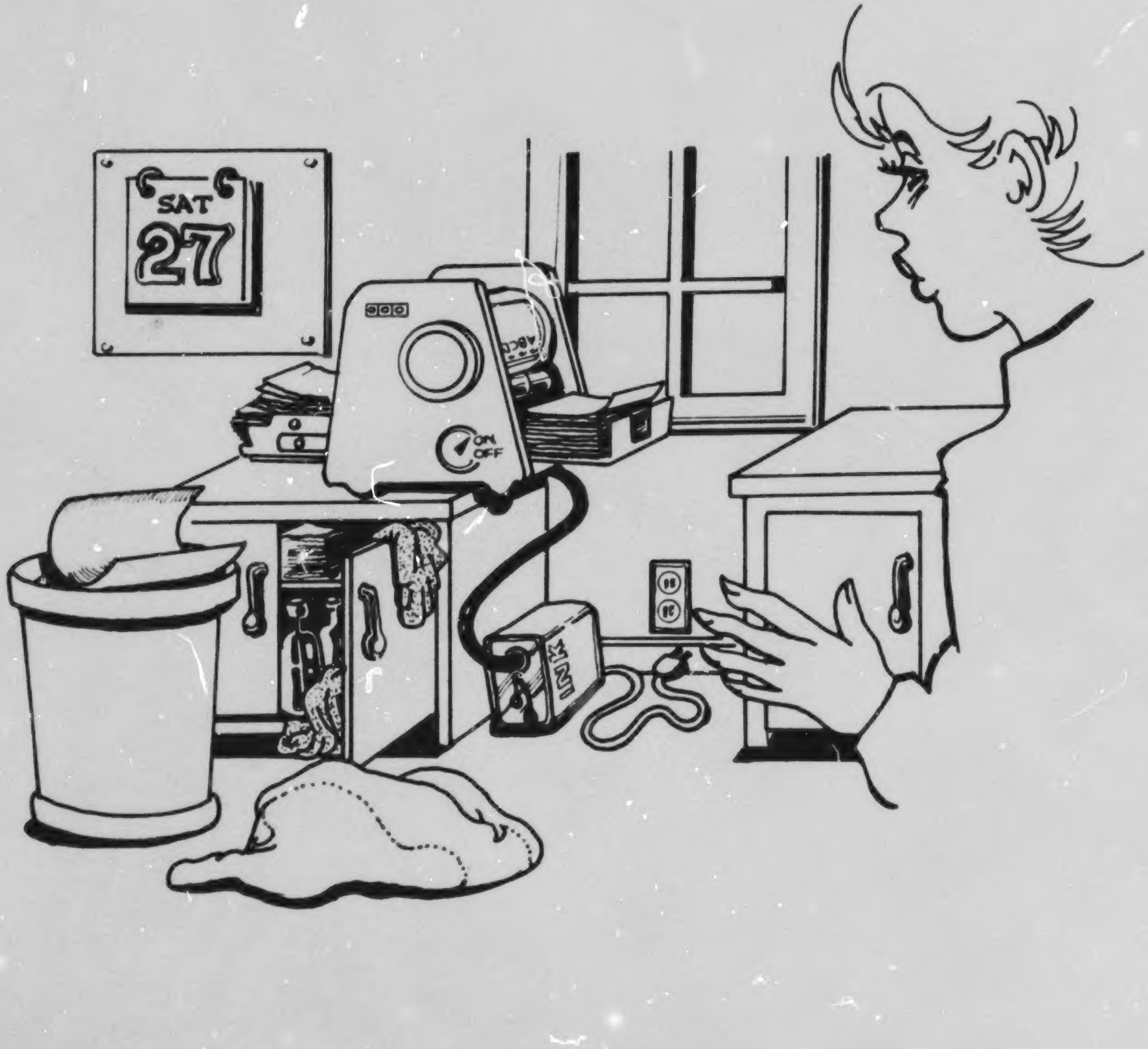
UNIT XIV

OPERATING THE STENCIL DUPLICATOR

ASSIGNMENT SHEET #2--DETERMINING INCORRECT PROCEDURES

Directions: The following picture has several things wrong in regard to stencilization. Study the picture carefully and then write a statement on each incorrect procedure, how to correct it, and what will happen if it is not corrected.



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UNIT XIV

OPERATING THE STENCIL DUPLICATOR

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

1. Correction fluid (c)
2. Stencil folder (d)
3. Paper clip (e)
4. Stencil (f)
5. Copy paper (g)
6. Typewriter (h)
7. Styli (l)
8. Illiminated drawing board (n)
9. Type cleaner (o)
10. Stencil duplicator (p)

Assignment Sheet #2

1. The machine has been left disorderly over the weekend.
2. The ink can is on its side. This can cause the ink to leak on the floor. It should be set upright.
3. The "on-off" knob is on. When the machine is plugged in, it will start running.
4. The machine cover is on the floor. It will get dirty and when it is put over the machine it will cause dirt to fall into the machine.
5. The drum cover is in the trash can. It should not be thrown away, rather it should be placed back on the drum when finished copying.
6. The storage cabinet is a mess and is open. This can cause wastage of supplies.

7. The copy paper is not straight.
8. The stencil is on backwards.
9. The machine is not centered safely on the table.

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UNIT XIV

OPERATING THE STENCIL DUPLICATOR

JOB SHEET #1--TYPING A STENCIL

I. Tools and equipment needed:

   A. Typewriter

   B. Typewriter cleaning supplies

   C. Stencil

   D. Handouts

   E. Burnisher

   F. Stencil correction fluid

II. Job procedures:

Assume you are employed as a typist and one of your routine tasks is to type stencils for duplication. Select any one of the available handouts and type a stencil from it. Be sure to consider all points in preparing a stencil.

(NOTE: Additional handouts should be provided by the instructor.)

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UNIT XIV

OPERATING THE STENCIL DUPLICATOR

JOB SHEET #1 HANDOUT

TELEPHONE COURTESY PAYS OFF

1. Answer promptly.
2. Identify yourself.
3. Transfer calls properly.
4. Keep pad and pencil handy.
5. Leave a message when you leave.
6. Place your own calls.
7. List frequently called numbers.
8. Do not say "Who's calling?".
9. If you leave the line, explain why.
10. Indicate your understanding.
11. Terminate call courteously.

T alk slowly

E mpty your mouth

L isten carefully

E nunciate clearly

P ick up phone quickly

H old line (for second caller)

O btain right number

N ote down message

E nd call promptly

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UNIT XIV

OPERATING THE STENCIL DUPLICATOR

JOB SHEET #2--USING A STYLUS

I. Tools and equipment needed:

   A. Stencil

   B. Stylus - wire loop and roll-point

   C. Rough draft picture or diagram

   D. Burnisher

   E. Stencil correction fluid

II. Job procedures:

Choose any one of the available rough drafts of pictures or diagrams and draw on the stencil a replica using the proper stylus. Be sure to sign your name with the proper stylus also.

(NOTE: Rough drafts of pictures or diagrams should be provided by the instructor. Transparency master may be used to copy.)

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UNIT XIV

OPERATING THE STENCIL DUPLICATOR

JOB SHEET #3--RUNNING THE STENCIL DUPLICATOR

I. Tools and equipment needed:

- A. Stencil duplicator
- B. Stencil
- C. Copy paper
- D. Ink

II. Job procedures:

Make copies of the stencils completed in Job Sheet #1 and Job Sheet #2, using the stencil duplicator.

(NOTE: The number of copies is left up to the discretion of the teacher.)

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UNIT XIV

OPERATING THE STENCIL DUPLICATOR

ANSWERS TO JOB SHEETS

Job Sheet #1

The handout should be typed to the satisfaction of the instructor.

Job Sheet #2

The handout should be drawn on the stencil to the satisfaction of the instructor.

Job Sheet #3

The stencils should be reproduced to the satisfaction of the instructor.

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UNIT XIV

OPERATING THE STENCIL DUPLICATOR

UNIT TEST

1. Define the following terms:
   a. Stencil correction fluid

   b. Flexible writing plate

   c. Stencil

   d. Stylus

   e. Letter guides

   f. Illuminated drawing boards

   g. Screen plate

   h. Burnisher

   i. Stencil duplication

2. Identify the features of stencil duplication.
   a.

b.

c.

d.

e.

f.

g.

h.

i.

3. Name the four elements of stencil duplication.

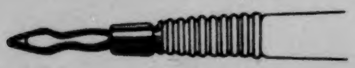
a.

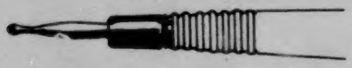
b.

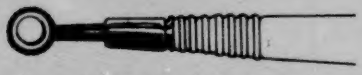
c.

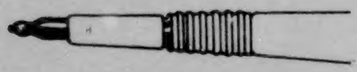
d.

4. Identify and define types of styli.









5. A. Cite the main steps in preparing an original stencil using the typewriter:

1.

2.

3.

4.

5.

6.

7.

8.

B. Cite main steps on how to prepare a stencil using a stencil-maker or a copier:

1.

2.

3.

4.

5.

6. Match the names of the parts of the stencil duplicator to the correct description. Place the correct letters in the blank next to the correct number.

_____ 1. Guide rail knob

_____ 2. Receiving tray

_____ 3. Brake

_____ 4. Head clamp

_____ 5. Paper corner separator

_____ 6. Angular adjustment

_____ 7. Guide rail

_____ 8. Motor switch

_____ 9. Copy counter

_____10. Hand wheel

_____11. Lateral adjustment

_____12. Feed roll pressure

_____13. Feed controls

_____14. Ink measuring rod

a. Tray in which the finished copy is automatically stacked

b. Device which separates the copy paper so that only one sheet feeds into the machine with each complete revolution of the machine

c. Lever which controls the electricity flow to the motor

d. Control which aids the horizontal centering of the feed table by moving it to the right or to the left

e. A measuring rod which aids the operator in determining the level of ink in the duplicator

f. Control which is turned to manually feed the paper through the machine

g. Control which holds the stencil against the drum

h. Lever which adjusts the guide rails for different sizes of paper

i. Guides on the feed tray which hold the copy paper in place

j. The feed table elevating knob which raises the paper to the feed rollers; the feed lowering knob which lowers the feed table; feed rollers which draw paper into the machine; and the feed control lever which engages the feed rollers

k. The adjustment control that sets the pressure of the rollers to allow the duplicator to handle papers of different weights

l. Counter which when preset determines the number of copies which the machine will make

m. The lever which aids in horizontal positioning of the copy

n. The lever which adjusts the ink drum so that it cannot be turned

7. Discuss the process of operating a mimeograph.

8. Demonstrate the ability to:

   a. Type a stencil.

   b. Use a stylus.

   c. Run the stencil duplicator.

   (NOTE: If the skills have not been accomplished prior to the test, ask the instructor when they should be completed.)

14.0303

UNIT XIV

OPERATING THE STENCIL DUPLICATOR

ANSWERS TO UNIT TEST

1. a. Stencil correction fluid--A chemical compound similar to the stencil coating

   b. Flexible writing plate--A translucent sheet of grained plastic used instead of the cushion sheet when drawing or tracing

   c. Stencil--Is a thin fibrous tissue paper coated with a wax substance which when pushed aside by a typewriter key or stylus, allows ink to pass through and a surface to be printed

   d. Stylus--A sharply pointed instrument used to write or draw on a stencil

   e. Letter guides--Plastic guides containing letter and number styles used in tracing letters and numbers

   f. Illuminated drawing board--A frame or box holding a translucent glass lighted from beneath

   g. Screen plate--A transparent plastic used to create shaded areas on pictures and illustrations already traced on a stencil

   h. Burnisher--Any smooth, rounded object that can be used to lightly rub an error in a circular motion to return some of the stencil coating to the stencilized area

   i. Stencil duplication--The flow of ink through stencilized openings to the copy paper

2. a. 50-10,000 copies

   b. Inexpensive for long runs

   c. Easy to read

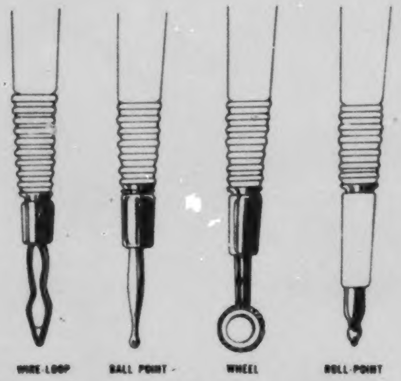
   d. Compared with the fluid duplicator, copies are of higher quality; compared with the offset duplicator, copies are of lesser quality.

   e. Relatively easy to cut stencils and run copies

- f. Hand-drawn illustrations or manufactured insets may be used.
- g. Reproduces color.
- h. Can be stored and used again.
- i. Uses absorbent, rough finished paper of any color.

3. a. Stencil
   - b. Ink
   - c. Copy paper
   - d. Stencil duplicator

4.



- a. Wire-loop stylus--Is the best for ruling or drawing. Keep the thinnest part of the stylus parallel to the line being drawn.
- b. Ball-point stylus--A ball-point stylus is best for fine detail. Use it as you would a pen.
- c. Wheel stylus--Comes in several patterns. It is used for drawing solid and broken lines. It must be kept parallel to the line being drawn when in use.
- d. Roll-point stylus--Is used for writing, signatures, and freehand drawing. When being used, it should be held almost vertically, with very fine, even pressure.

5. A. 1. Assemble the supplies.
   - 2. Assemble the stencil pack.
   - 3. Plan arrangement of material.

4. Prepare the typewriter.

5. Cut the stencil.

6. Correct the errors.

7. Proofread the stencil before removing it from the typewriter.

8. Draw, letter, and shade illustrations.

5. B. 1. Turn on machine and let warm 30 seconds.

2. Attach original, error-free copy.

3. Attach stencil.

4. Press start button.

5. When stencil is imaged, turn off machine.

6. h 1.

a 2.

n 3.

g 4.

b 5.

m 6.

i 7.

c 8.

l 9.

f 10.

d 11.

k 12.

j 13.

e 14.

7. Review the instructions of the operator's manual for your machine. Remove the machine cover and release the brake by moving the control to "off" position. Check the ink supply. Remove the protective cover from the ink pad around the drum by releasing the clamps that hold it in place. (NOTE: Do not throw it away.)

Remove the stencil film sheet and cushion sheet from the stencil and put the stencil on the drum face down by closing the head clamp and then tearing off the stencil backing sheet. Install a supply of duplicating paper on the feed table; adjust the paper guides; and raise the paper by turning the feed table elevating knob until the paper is within one-half inch of the feed rollers.

Crank the operating handle or operate the control mechanism in order to obtain several trial copies. Make the adjustments necessary to position the copy paper correctly and to ink the copy evenly. Set the copy counter for the number of copies the machine is to produce before it stops.

Activate the power switch or crank the machine until all copies required are run. Shut off power or stop the cranking of the machine. Remove completed copies from the receiving tray.

Remove the stencil from the drum by carefully raising the loose end away from the drum and releasing the head clamp. Place the stencil in a stencil folder for storage and attach a copy of the completed run on the outside of the folder.

Clean the machine and the working area by replacing the protective cover over the ink pad and returning the unused supplies to the storage cabinets. Set the brake in the "on" position.

8. Evaluated to the satisfaction of the instructor.

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UNIT XV

OPERATING THE OFFSET DUPLICATOR

TERMINAL OBJECTIVE

After completing this unit of instruction, the student will be able to define terms related to the offset process, identify the offset systems, list advantages and disadvantages of using the offset, and demonstrate the ability to prepare and process the offset master and operate the offset duplicator. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student will be able to:

1. Define terms associated with the offset process.
2. Select procedures describing the offset process.
3. Identify the offset press systems.
4. List advantages and disadvantages of the offset.
5. Demonstrate the ability to:
    - a. Prepare the offset master.
    - b. Operate the platemaker.
    - c. Process the offset plate.
    - d. File and store offset master.
    - e. Ink the offset duplicator.
    - f. Operate the offset duplicator.
    - g. Clean up the offset duplicator.

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UNIT XV

OPERATING THE OFFSET DUPLICATOR

SUGGESTED ACTIVITIES

I. Instructor:

   A. Provide objective sheet.

   B. Discuss objective sheet.

   C. Provide information sheet.

   D. Prepare supplemental information for information sheet.

   E. Discuss information sheet.

   F. Prepare transparencies.

   G. Demonstrate and discuss procedures outlined on job sheets.

   H. Give test and evaluate results.

II. Student:

   A. Read objective sheet.

   B. Participate in discussion of objective sheet.

   C. Read information sheet.

   D. Participate in discussion of information sheet and supplemental information provided by instructor.

   E. View transparencies.

   F. Read job sheets.

   G. Complete job sheets.

   H. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objectives

B. Information sheet

C. Transparency masters

1. XV-TM-1--Direct Image Paper Master
2. XV-TM-2--The Reverse Image Process
3. XV-TM-3--The Offset Systems
4. XV-TM-4--Offset Duplicator Parts
5. XV-TM-5--Platemaker

D. Job sheets

1. Job Sheet #1--Prepare the Offset Master
2. Job Sheet #2--Operate the Platemaker
3. Job Sheet #3--Process the Offset Plate
4. Job Sheet #4--File and Store Offset Masters
5. Job Sheet #5--Ink the Offset Duplicator
6. Job Sheet #6--Operate the Offset Duplicator
7. Job Sheet #7--Clean Up the Offset Duplicator

E. Answers to job sheets

F. Test

G. Answers to test

II. References

A. A. B. Dick. Operating Instructions--Model 111 Offset Platemaker. Chicago: A. B. Dick Company, 1970.

B. ______________. Operating Instructions--Models 324 and 326 Offset Duplicators. Chicago: A. B. Dick Company, 1971.

C. Benevento, Frank S. The Offset Printing Unit. Pittsburgh: Graphic Arts Technical Foundation, 1970.

D. Cogoli, John E. Photo Offset Fundamentals. 3rd. ed. Bloomington, Illinois: McKnight Publishing Company, 1973.

E. Pasewark, William R. Duplicating Machine Processes. 2nd ed. Cincinnati, Ohio: South-Western Publishing Co., 1975.

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UNIT XV

OPERATING THE OFFSET DUPLICATOR

INFORMATION SHEET

I. Terms and Definitions

A. Offset plate--Thin sheet of paper, plastic or metal on which an inked printing image is transferred to the offset blanket when the offset duplicator is operating

B. Offset duplicator--Machine which transfers the image from an offset plate to paper. Printing unit consists of a plate cylinder, blanket cylinder and impression cylinder.

C. Platemaker--Machine which exposes material on to an offset plate to be used for duplicating

D. Plate (master) cylinder--Used to hold the offset plate in place and bring the plate into contact with the dampening rollers

E. Blanket cylinder--Cylinder on the offset duplicator used to hold a rubber blanket which comes into contact with the inked image on the plate cylinder

F. Impression cylinder--Cylinder which carries the paper inside the offset duplicator

II. The offset process

A. The offset process is based on the principle that oil and water will not readily mix. For us that means that an oil-based printing ink and a water-based repellant will not mix.

B. Copies on an offset duplicator are reproduced from a paper or metal master, which is sometimes called a plate.

C. A direct image is deposited on the master. The master is attached around a rotating cylinder called the plate (or master) cylinder.

D. As the master cylinder revolves, the master is brought into contact with a small roller (water roller) moistened with a water-based solution. This solution sticks to the area of the master that has no images, but will not stick to the image areas.

E. As the master cylinder rotates, an ink roller moistened with ink contacts the master. The ink from the ink roller sticks to the image areas only. The image now appears in the form of ink on a wet water-based background.

F. As the master returns farther, it comes in contact with another large cylinder which has a large sheet of rubber wrapped around it (called a blanket). When both cylinders rotate, the image from the master cylinder is transferred to the "blanket" cylinder. The image on the blanket cylinder is the reverse of the image that was on the master (or plate) cylinder.

G. Another roller called an impression roller presses a clean piece of copy paper against the blanket cylinder. The ink on the blanket cylinder now goes on the paper. The paper with the image comes out on the other side of the machine.

III. Offset press systems

A. Dampening system

1. In this system, dampening rollers apply a film of dampening solution to the surface of the offset plate which is wrapped around the plate cylinder.

2. The dampening solution sticks only to the clear areas of the plate.

B. Inking system

1. On the plate after it has been dampened, the ink rollers apply a film of ink which sticks only to the image portion of the plate.

2. This process of dampening and inking continues throughout the running of the press. In this way the non-printing areas of the plate remain clear and the ink stays on the plate image area.

C. Main printing unit

1. In this unit, the inked plate image is transferred to the surface of the blanket (on the blanket cylinder) when the plate cylinder and the blanket cylinder come into contact with each other.

2. The image on the blanket is printed on a sheet of paper as it passes between the blanket and impression cylinders.

D. Feeding unit

1. Most large paper presses have feeders which are air vacuum operated.

2. A blast of air separates the top sheets, causing them to float individually.
3. Most small duplicators have rubber feed rollers.
4. The feed table maintains the paper pile at the correct height.
5. Sheet separates hold back all but the top sheet from going into the machine.

E. Register board and sheet controls

1. This system is only found on large offset presses.
2. This system allows the sheet to be put into place so that it is ready to be gripped by the rollers which will carry the paper into the machine.

F. Delivery system

1. On most duplicators, the printed sheet is ejected from the machine into a delivery tray.
2. On larger presses, the sheet is placed into a receding stacker where the paper is stacked neatly.

IV. Advantages and disadvantages of the offset

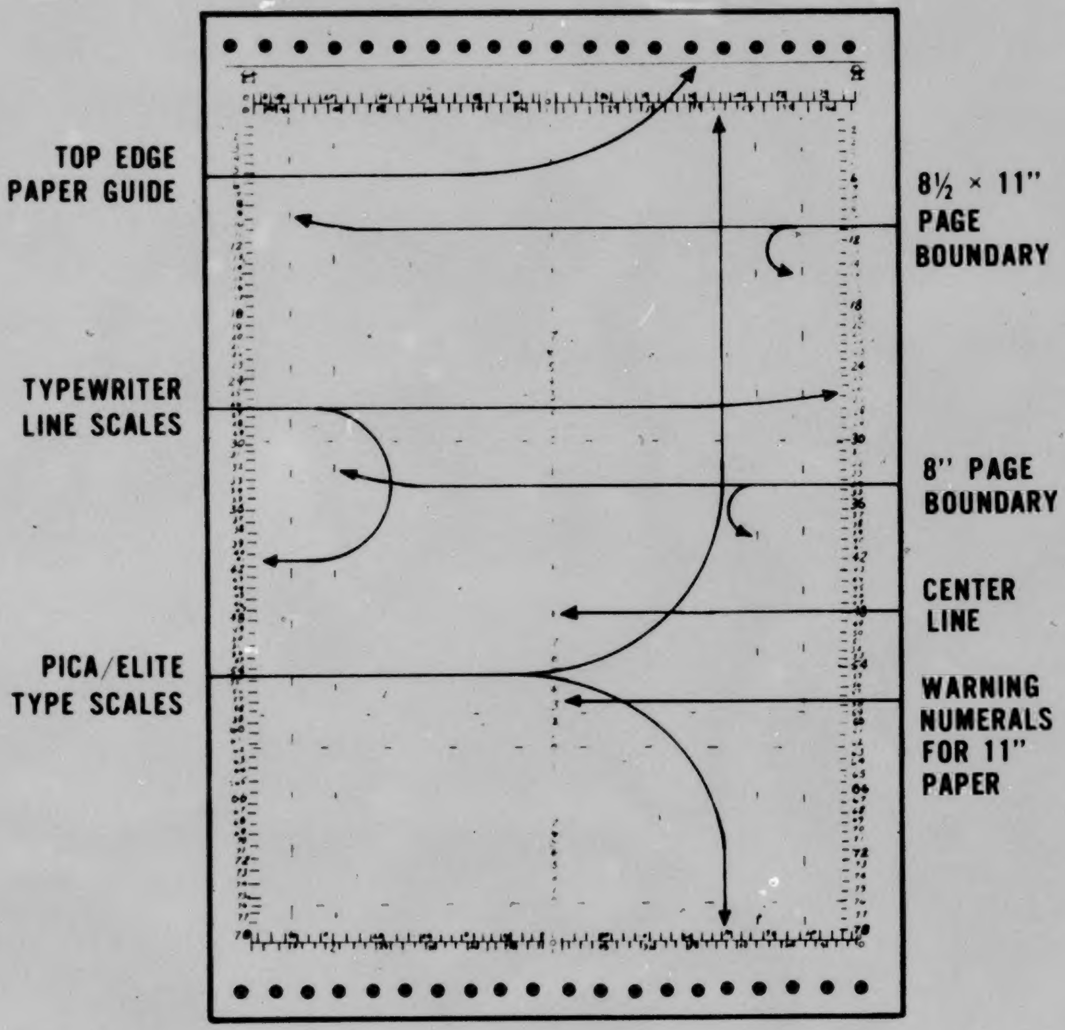
A. Advantages

1. The quality of the copy looks as good as the original.
2. Each copy is the same high quality.
3. Printing can be done in color.
4. Many copies can be produced in a short period of time.

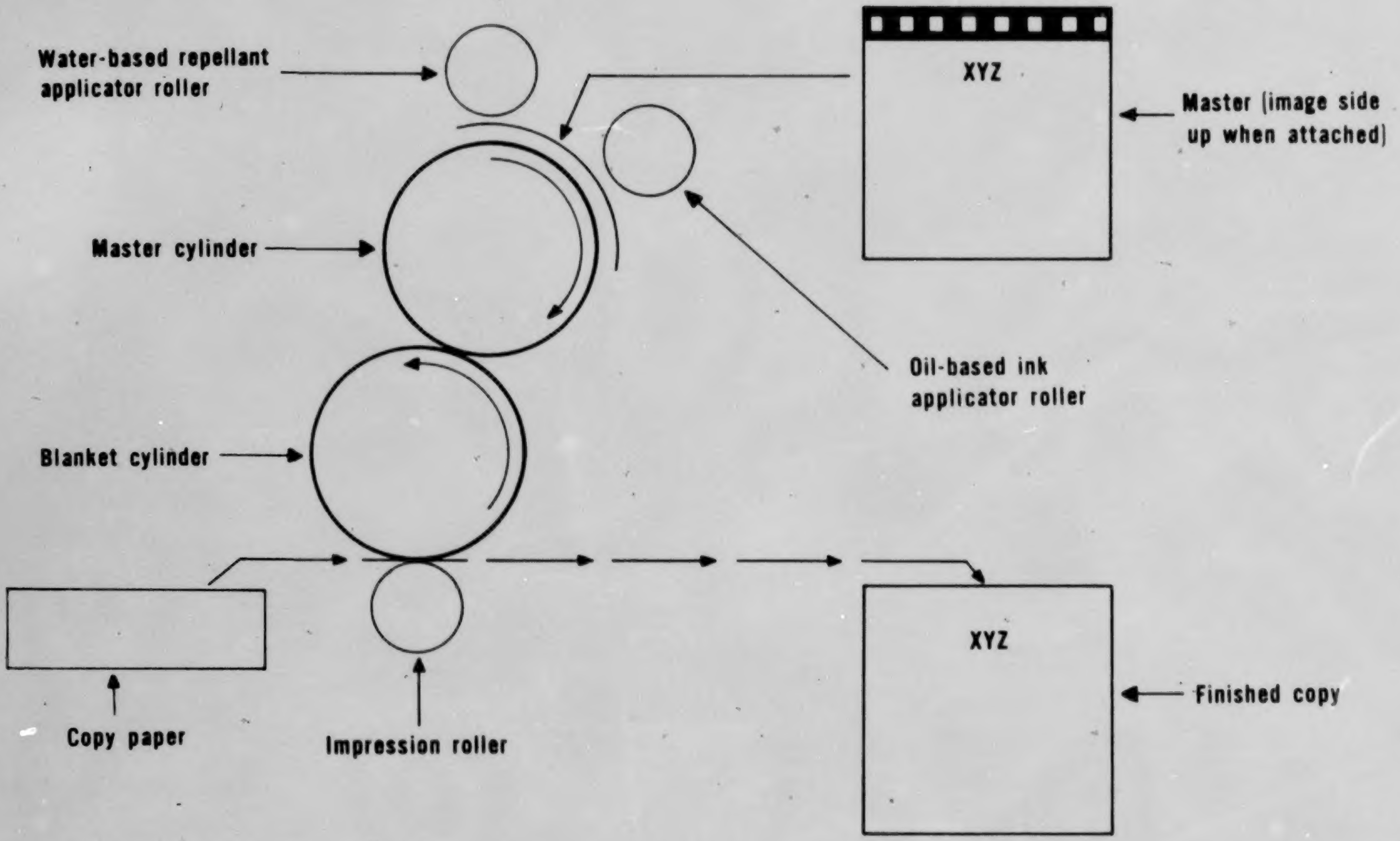
B. Disadvantages

1. Equipment and machine upkeep is more expensive than other forms of duplication.
2. The procedures in operating the machine are more technical.
3. It is more expensive to keep up the machine.
4. Material costs are higher than in other forms of duplication.

DIRECT IMAGE PAPER MASTER



THE REVERSE IMAGE PROCESS


Water-based repellant applicator roller
XYZ
Master (image side up when attached)
Master cylinder
Oil-based ink applicator roller
Blanket cylinder
Copy paper
Impression roller
XYZ
Finished copy

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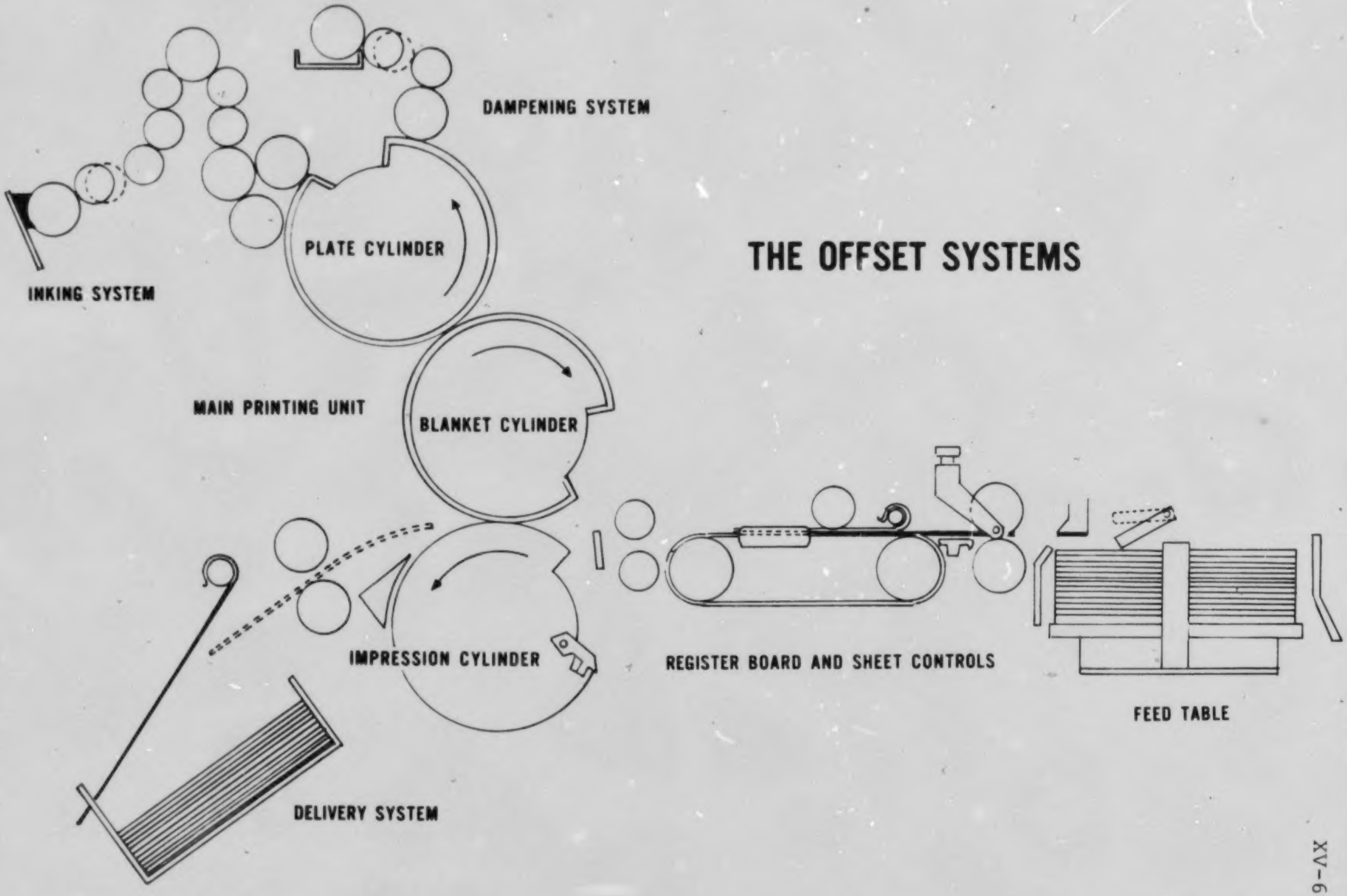
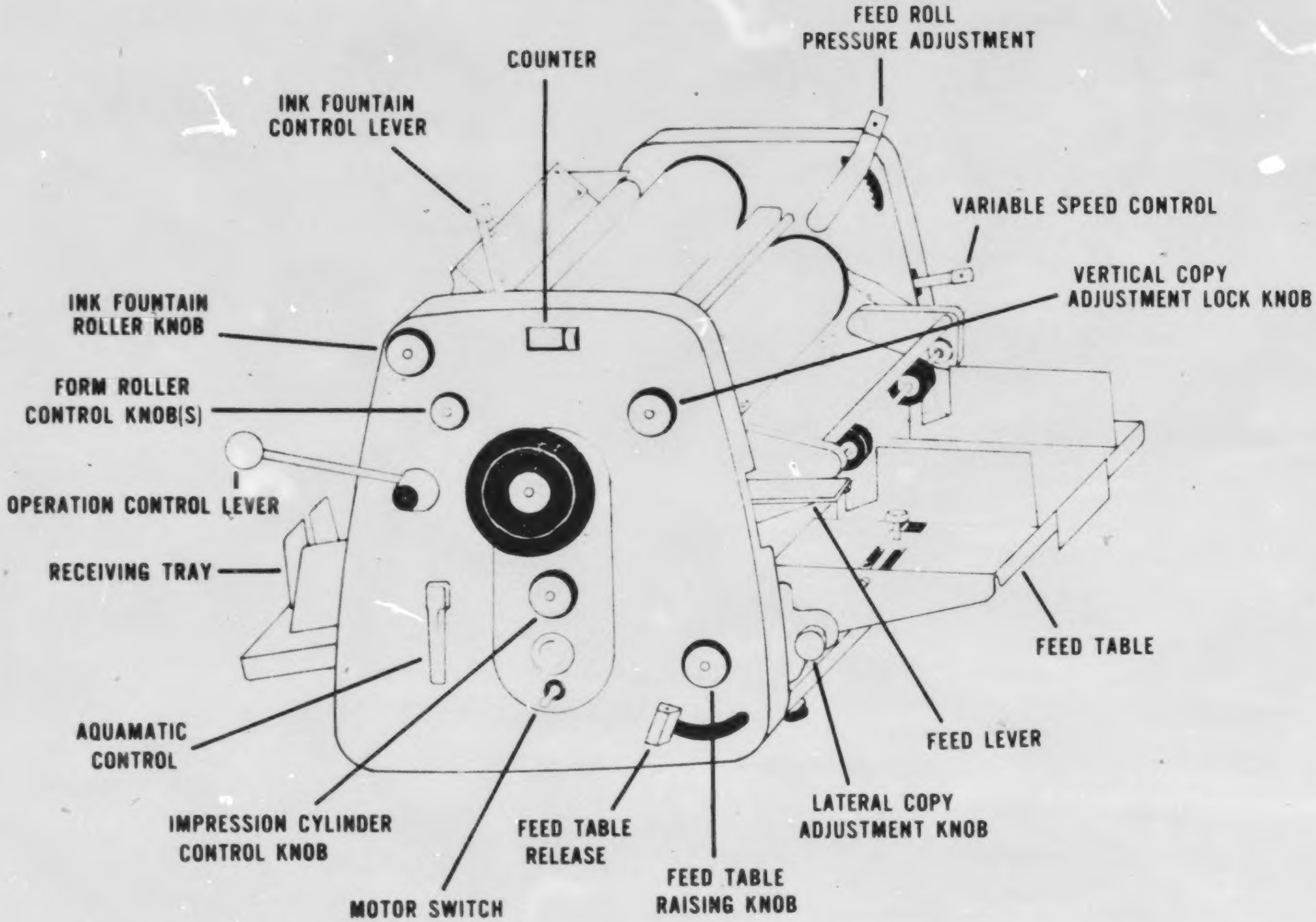
XV-633

THE OFFSET SYSTEMS



OFFSET DUPLICATOR PARTS



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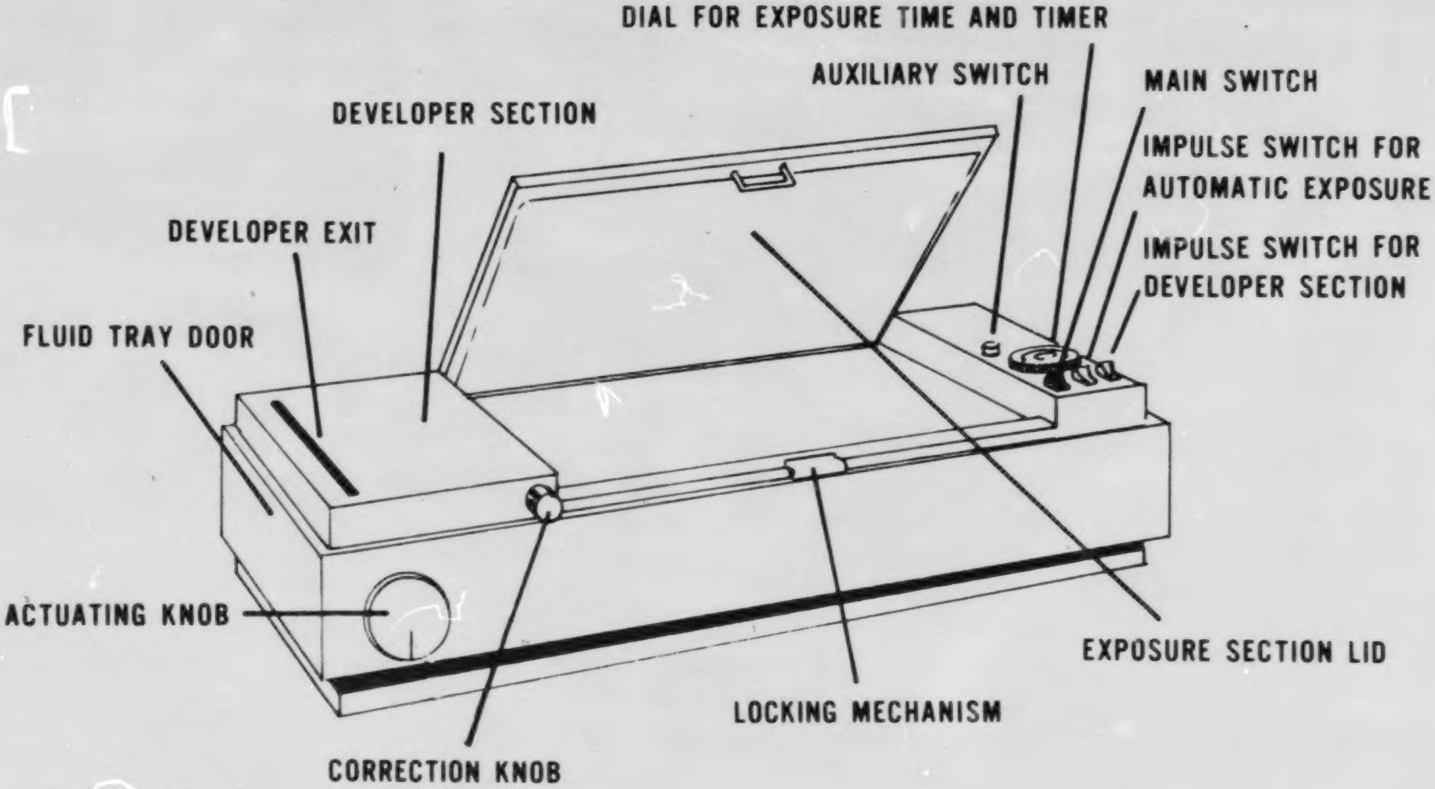
XV-637

THE PLATEMAKER



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UNIT XV

OPERATING THE OFFSET DUPLICATOR

JOB SHEET #1--PREPARE THE OFFSET MASTER

I. Tools, Materials and Equipment Required:

   A. Typewriter

   B. Carbon ribbon

   C. Soft, nongreasy offset eraser

   D. Offset master

   E. Draft material to be typed

II. Procedures:

   A. Clean type faces on typewriter if dirty.

   B. Check to see if feed rolls and platen are free from smudges and deposits.

   C. Insert offset master in typewriter.

   (NOTE: The side on which nonreproducible guide markings are printed is the side on which typing should be done.)

   D. Type masters using a uniform touch.

   (NOTE: If you are using an electric typewriter, place the pressure control setting in the lowest position.)

   E. When correcting an error, erase the image with the eraser very lightly removing only the carbon deposit on the master.

   F. Proofread typed material before removing it from typewriter.

   G. Remove typed material.

   H. Turn the machine off if you are using an electric typewriter.

   I. Store supplies.

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UNIT XV

OPERATING THE OFFSET DUPLICATOR

JOB SHEET #2--OPERATE THE PLATEMAKER

I. Tools, Materials and Equipment Required:

  A. Offset plate

  B. Negative paper

  C. Fixer

  D. Lacquer

  E. Cotton swabs

  F. Cotton pads

  G. Platemaker

  H. Desensitizer

  I. Plate gum

II. Procedures:

  A. Photocopying Process

  (NOTE: These procedures are general. Follow specific instructions contained in operator's manual for particular model.)

  1. Set exposure dial control.

  2. Place negative, yellow side up, in machine.

  3. Place original face down on negative, making sure original is aligned.

  4. Close lid and turn on main switch.

  5. Press impulse switch for exposure.

  6. Remove original and turn negative face side down.

  7. Position plate, dull side up, on glass and align under separator.

  8. Place negative, yellow side down on top of plate, sliding on top of separator.

9. Press switch for developer section.
10. Wait a specified period of time and peel negative from plate.
11. Treat plate with fixer.
12. Treat plate with lacquer.
13. Rinse excess lacquer from plate with water.
14. Treat plate with preserving material, if plate is not to be used immediately.
15. Clean up area and store supplies.

B. Light Exposure Process

1. Set exposure control.
2. Place prepared negative on top of metal offset plate.
3. Secure negative and plate firmly.
4. Expose to light approximately three minutes.
5. Remove the plate and negative from platemaker.
6. Wipe metal plate with densensitizer solution with cotton pad.
7. Develop plate with lacquer.
8. Rinse plate thoroughly.
9. Put thin coat of plate gum preserver on plate.

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UNIT XV

OPERATING THE OFFSET DUPLICATOR

JOB SHEET #3--PROCESSING THE OFFSET PLATE

I. Tools, Materials and Equipment Required:

A. Metal and paper plates

B. Fixer

C. Cotton pads

D. Lacquer

E. Developer

F. Platemaker

G. Etching solution

II. Procedures:

(NOTE: These procedures are general. Follow more specific instructions contained in operator's manual for particular model.)

A. Processing metal plate

1. Place plate on glass surface or smooth plastic table top.

2. Spread fixer smoothly over plate with cotton pad.

3. After a few seconds, place lacquer in a non-image area of the plate.

4. Wipe lacquer over copy area with a fresh cotton pad, moving from left to right with light strokes.

5. Immediately rinse plate with water.

6. If unwanted images are on plate, remove the image with a cotton pad moistened with developer solution.

7. Store plate.

B. Processing paper plate

1. Place plate on a glass surface or plastic table top.

2. Pour etching solution onto the plate.
3. With a clean cotton pad, rub solution over the entire surface of plate.
4. Wipe plate with wet cotton pad before attaching it to the offset machine.

   (NOTE: Be sure plate is still damp when attaching to the offset. If it has had time to dry, the ink will cover all areas.)

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UNIT XV

OPERATING THE OFFSET DUPLICATOR

JOB SHEET #4--FILE AND STORE OFFSET MASTERS

I. Tools, Materials and Equipment Required:

  A. Offset master

  B. Offset duplicator

  C. Cotton pad

  D. Gum solution

  E. Preserving solution

  F. Water

  G. Copy paper

II. Procedures:

  A. After copies have been duplicated, run a few sheets of paper with form rollers out of contact with master cylinder.

  B. Remove master from cylinder.

  C. Remove any ink or fountain solution on the master with the cotton pad moistened with water.

  D. Apply a thin coat of diluted gum solution over master.

  (NOTE: If corrections or additions are going to be made on the master, apply a thin coat of preserving solution on master.)

  E. Let master dry.

  F. Store master by placing a sheet of plain paper on both sides of the master.

  G. Place master with the sheets of paper flat in their original box.

  H. Make sure storage area is cool and dry.

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UNIT XV

OPERATING THE OFFSET DUPLICATOR

JOB SHEET #5--INK THE OFFSET DUPLICATOR

I. Tools, Materials and Equipment Required:

A. Fountain concentrate

B. Ink knife

C. Ink

D. Cotton pads

E. Water

F. Offset duplicator

II. Procedures:

(NOTE: These procedures are general. Follow specific instructions contained in operator's manual.)

A. Remove or secure loose jewelry, neckties, scarves, or other similar items.

B. Secure hair so that it does not fall over shoulders.

C. Move night latch to ink position.

D. Position moisture (aquamatic) control to highest setting.

E. Place ink in ink fountain.

F. Rotate ink roller and adjust ink fountain screws.

G. Rotate hand wheel for ink roller to contact fountain roller.

H. Move ink fountain control.

I. Set or raise lock out lever.

J. Turn machine on and allow time for even distribution of ink on rollers.

K. Move ink fountain control to recommended position.

L. Raise or press down moisture lock out lever depending on machine type.

M. Move moisture control to "off" position and turn machine off.

N. Fill fountain concentrate bottle and mix solution to recommended ratio of water and fountain concentrate.

O. Place bottle in moisture unit.

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UNIT XV

OPERATING THE OFFSET DUPLICATOR

JOB SHEET #6--OPERATE THE OFFSET DUPLICATOR

I. Tools, Materials and Equipment Required:

A. Ink knife

B. Ink

C. Fountain solution

D. Copy paper

E. Cotton pads

F. Offset master

II. Procedures:

(NOTE: These procedures are general. Follow specific instructions contained in operator's manual.)

A. Remove or secure loose jewelry, neckties, scarves, or other similar items.

B. Secure hair so that it does not fall over shoulders.

C. Lower feed table.

D. Load copy paper on feed table.

E. Check or adjust feeding and receiving tray.

F. Adjust feed roll pressure.

G. Attach master. (Moisten first if using a paper master.)

H. Moisten master.

I. Turn machine "on".

J. Move moisture "aquamatic" control to desired setting.

K. Move ink control and allow machine to run a few revolutions.

L. Set control lever to image position.

M. Move control lever to feed position.

N. Feed paper into the machine.

O. Run test copy and make any necessary adjustments.

P. Set counter.

Q. Run desired number of copies.

R. Move operation controls to neutral and feed additional blank paper.

S. Turn machine off.

T. Remove master.

U. Clean blanket and cylinder.

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UNIT XV

OPERATING THE OFFSET DUPLICATOR

JOB SHEET #7--CLEAN UP THE OFFSET DUPLICATOR

I. Tools, Materials and Equipment Required:

- A. Clean rags
- B. Cleanup mats
- C. Blanket and roller wash
- D. Offset duplicator
- E. Blanket wash

II. Procedures:

(NOTE: These procedures are general. Follow specific instructions for particular model contained in operator's manual.)

- A. Remove excess paper.
- B. Remove fountain concentrate.
- C. Remove excess ink from ink fountain.
- D. Remove ink fountain.
- E. Remove ductor roller.
- F. Clean ink fountain and ductor roller.
- G. Attach cleanup mat.
- H. Turn on machine to lowest speed.
- I. Turn moisture control to highest setting.
- J. Apply clean up solution onto ink roller.
- K. Move control lever to ink and allow machine to run until cleanup mat is coated with ink.

  (NOTE: More than one cleanup mat may be needed.)
- L. Continue with Steps J & K until mats stay fairly clean.

M. Turn moisture control to "off" position.

N. Turn machine to night latch position.

O. Clean moisture unit tray.

P. Replace ink roller.

Q. Replace ink fountain.

R. Move roller control to night latch position.

S. Clean up any ink from machine.

T. Store supplies.

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UNIT XV

OPERATING THE OFFSET DUPLICATOR

ANSWERS TO JOB SHEETS

Job Sheet #1

Evaluated to the satisfaction of the instructor.

Job Sheet #2

Evaluated to the satisfaction of the instructor.

Job Sheet #3

Evaluated to the satisfaction of the instructor.

Job Sheet #4

Evaluated to the satisfaction of the instructor.

Job Sheet #5

Evaluated to the satisfaction of the instructor.

Job Sheet #6

Evaluated to the satisfaction of the instructor.

Job Sheet #7

Evaluated to the satisfaction of the instructor.

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UNIT XV

OPERATING THE OFFSET DUPLICATOR

UNIT TEST

1. Define the following terms:

   a. Offset plate -

   b. Offset duplicator -

   C. Platemaker -

   d. Plate (master) cylinder -

   e. Blanket cylinder -

   f. Impression cylinder -

2. Place a "✓" beside those statements that are true concerning the offset process.

   _____ a. The offset process is based on the principle that oil and water mix readily.

   _____ b. Copies on an offset duplicator are produced from metal or paper masters.

_____ c. A direct image is deposited on the master which is attached to the plate cylinder.

_____ d. The water solution sticks to the part of the offset master which has images.

_____ e. Ink sticks to those areas on the offset master that has images.

_____ f. The image on the blanket cylinder is the reverse of the image that was on the plate cylinder.

_____ g. The impression cylinder presses a piece of clean copy paper against the blanket system.

3. List the offset press systems.

    a.

    b.

    c.

    d.

    e.

    f.

4. Discuss the advantages and disadvantages of the offset.

    a. Advantages

    b. Disadvantages

5. Demonstrate the ability to:

    a. Prepare the offset master.

    b. Operate the platemaker.

c. Process the offset plate.

d. File and store offset masters.

e. Ink the offset duplicator.

f. Operate the offset duplicator.

g. Clean up the offset duplicator.

(NOTE: If these activities have not been completed prior to the test, ask the instructor when they should be completed.)

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UNIT XV

OPERATING THE OFFSET DUPLICATOR

ANSWERS TO UNIT TEST

1. a. Offset plate--Thin sheet of paper, plastic or metal on which an inked printing image is transferred to the offset blanket when the offset duplicator is operating

   b. Offset duplicator--Machine which transfers the image from an offset plate to paper. Printing unit consists of a plate cylinder, blanket cylinder and impression cylinder.

   c. Platemaker--Machine which exposes material onto an offset plate to be used for duplicating

   d. Plate (master) cylinder--Used to hold the offset plate in place and bring the plate into contact with the dampening rollers

   e. Blanket cylinder--Cylinder on the offset duplicator used to hold a rubber blanket which comes into contact with the inked image on the plate cylinder

   f. Impression cylinder--Cylinder which carries the paper inside the offset duplicator

2. ______ a.

   __✓__ b.

   __✓__ c.

   ______ d.

   __✓__ e.

   __✓__ f.

   __✓__ g.

3. a. dampening system

   b. inking system

   c. main printing unit

   d. feeding unit

  - e. register board and sheet controls
  - f. delivery system

4. a. Advantages

    (1) Quality of paper looks as good as the original.

    (2) Each copy is the same high quality.

    (3) Printing can be done in color.

    (4) Many copies can be produced in a short period of time.

   b. Disadvantages

    (1) Equipment is more expensive than other forms of duplication.

    (2) Procedures in operating the machine are more technical.

    (3) More expensive to keep up the machine

    (4) Material costs are higher than for other forms of duplication.

5. Evaluated to the satisfaction of the instructor.

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UNIT XVI

OPERATING THE TRANSCRIBING MACHINE

TERMINAL OBJECTIVE

After completion of this unit, the student will be able to differentiate between the types of dictating-transcribing machines, list the advantages and disadvantages of transcribing machines, and operate a transcribing machine. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completion of this unit of instruction, the student will be able to:

1. Discuss the styles of dictating-transcribing machines.
2. Differentiate between the types of dictating-transcribing devices.
3. Describe the dictating-transcribing procedure.
4. List the advantages and disadvantages of dictating-transcribing machines.
5. Demonstrate the ability to:
    - a. Operate a dictating-transcribing machine.
    - b. Type a mailable copy from a dictating-transcribing machine.

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UNIT XVI

OPERATING THE TRANSCRIBING MACHINE

SUGGESTED ACTIVITIES

I. Instructor:

- A. Provide objective sheet.
- B. Discuss objective sheet.
- C. Provide information sheet.
- D. Discuss information sheet.
- E. Make transparencies.
- F. Discuss and demonstrate the proper procedure for transcribing.
- G. Provide job sheets.
- H. Select and provide transcription belts from commercial or teacher prepared tapes, cassettes, belts, and discs.
- I. Discuss job sheets.
- J. Secure visit to business that uses transcribing machines.
- K. Give test and evaluate results.

II. Student:

- A. Read objective sheet.
- B. Participate in discussion of the objective sheet.
- C. Read information sheet.
- D. Participate in discussion of the information sheet.
- E. View transparencies.
- F. Participate in the discussion and demonstration of the proper procedure for transcribing.
- G. Read job sheets.
- H. Secure transcription belts from teacher.

I. Complete job sheets.

J. Visit business that uses transcribing machines.

K. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

A. Objectives

B. Information sheet

C. Transparency masters

1. XVI-TM-1--Styles of Dictating-Transcribing Machines
2. XVI-TM-2--Types of Dictating-Transcribing Machines
3. XVI-TM-3--Indicator Slip
4. XVI-TM-4--Transcribing

D. Job sheets

1. Job Sheet #1--Transcribing a Rough Copy
2. Job Sheet #2--Transcribing a Mailable Copy
3. Job Sheet #3--Booklet

E. Answers to job sheets

F. Field trip

G. Test

H. Answers to test

II. References:

A. Books

1. Meehan, James R. and others. Clerical Office Procedures. 5th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

2. Meehan, James R. and others. Secretarial Office Procedures. 8th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

B. Pamphlets:

1. ________. Dictaphone Brochures. New York, New York: Dictaphone Corporation, 1975.

2. ________. Office Procedures Manual. Curriculum Bulletin No. 503. Fort Worth, Texas: Fort Worth Public Schools, 1969.

3. ________. Suggestions, Materials, Course Study-Office Education. Dallas, Texas: South-Western Publishing Co., n.d.

C. Tapes:

1. Dow, Roger W. Legal Transcription. Mountain View, California: Western Tape.

2. Ingmire, Sally J. Introduction to Medical Transcription. Mountain View, California: Western Tape.

3. McLean, Gary N. Comprehensive Word Processing. Mountain View, California: Western Tape.

4. Melrose, John and others. Machine Transcription Practice--Education and Insurance. Mountain View, California: Western Tape.

5. Mitchell, William. Modern Office Dictation. Mountain View, California: Western Tape.

6. Morton, Joyce. The Legal Secretary. Mountain View, California: Western Tape.

7. Skimin, Eleanor and Patsy McMurtrie. Office Style Dictation Tapes. Long Beach, California: Teaching Aids Incorporated.

8. Wooley, LeGrande H. Medical-Dental Terminology. Mountain View, California: Western Tape.

9. __________. AMRA Medical Transcription. Mountain View, California: Western Tape.

10. __________. Dictation for "Tomorrow's Secretary". Atlanta, Georgia: Lanier Business Products, 1972.

11. __________. Machine Transcription in the Modern Office. Atlanta, Georgia: Lanier Business Products, 1976.

12. __________. New York State Machine Transcription Course. Mountain View, California: Western Tape.

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14. __________. U.S. Business Speaks. Mountain View, California: Western Tape.

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UNIT XVI

OPERATING THE TRANSCRIBING MACHINE

INFORMATION SHEET

I. Styles of dictating-transcribing machines

  A. Portable units - Small transistorized units which provide the executive with the equipment needed to dictate at home, in the car, or on a trip

  B. Standard units

    1. Separate machines - The executive has one machine on his desk for dictating and the secretary has a different machine on her desk for transcribing.

    2. Combination units - One machine performs both the dictating and transcribing functions.

  C. Remote control units - A network of equipment which provides a way for executives throughout a company to use the services of a central dictation and transcription facility

II. Types of dictating-transcribing machines

  A. Plastic belt or disc

    1. Inexpensive, not reusable, easily filed or mailed transcribing media

    2. Have handy devices which indicate the approximate number of words dictated

    3. Show errors by a mark on the indicator slip that accompanies the belt and by the employer on the belt

  B. Magnetic belts or discs

    1. Are reusable because they can be erased electronically

       (NOTE: This includes erasing of errors.)

    2. Can be filed or mailed easily; however, processing must be done by hand because electronic devices sometimes used can erase the dictation.

C. Magnetic tapes (cassettes)

    1. Will take a large amount of dictation and can be filed easily

    2. Can be mistakenly erased if the wrong button is pushed

    3. The length of dictation on magnetic tapes is difficult to judge.

D. Microphone - A hand or desk microphone is usually used to record dictation on a machine in the office.

E. Telephone - An instrument resembling a telephone that may be used to record dictation to a central transcription room.

III. Dictating-transcribing procedure

A. Put on ear pieces or headsets.

B. Place recorded dictation on the transcribing machine.

C. Place indicator slip in the slot provided.

(NOTE: The indicator slip is a guide for efficient transcription of certain information, such as the length of the letter.)

D. Adjust controls - speed, volume, and tone.

E. Listen to corrections and special instructions before transcribing any of the dictated material.

F. Use the indicator slip as a guide for the proper placement of the material to be transcribed.

G. Be sure to understand the meaning of dictation before typing to avoid

    1. Errors in grammar.

    2. Errors in punctuation.

    3. Errors in spelling.

    4. Confusion of homonyms, such as deer and dear.

H. Develop the ability to retain dictation in your mind.

I. Develop the ability to keep the typewriter moving as the transcribing unit stops.

J. Develop the ability to use the typewriter parts advantageously.

K. Develop skillful proofreading.

IV. Advantages and disadvantages of the dictating-transcribing machines

A. Advantages

1. Dictating machines enable the employer to dictate whenever the need arises.

2. Dictating-transcribing machines are less time consuming than other methods of recording information.

3. The employer can take a portable machine along on trips and send the recordings back to the office to be transcribed.

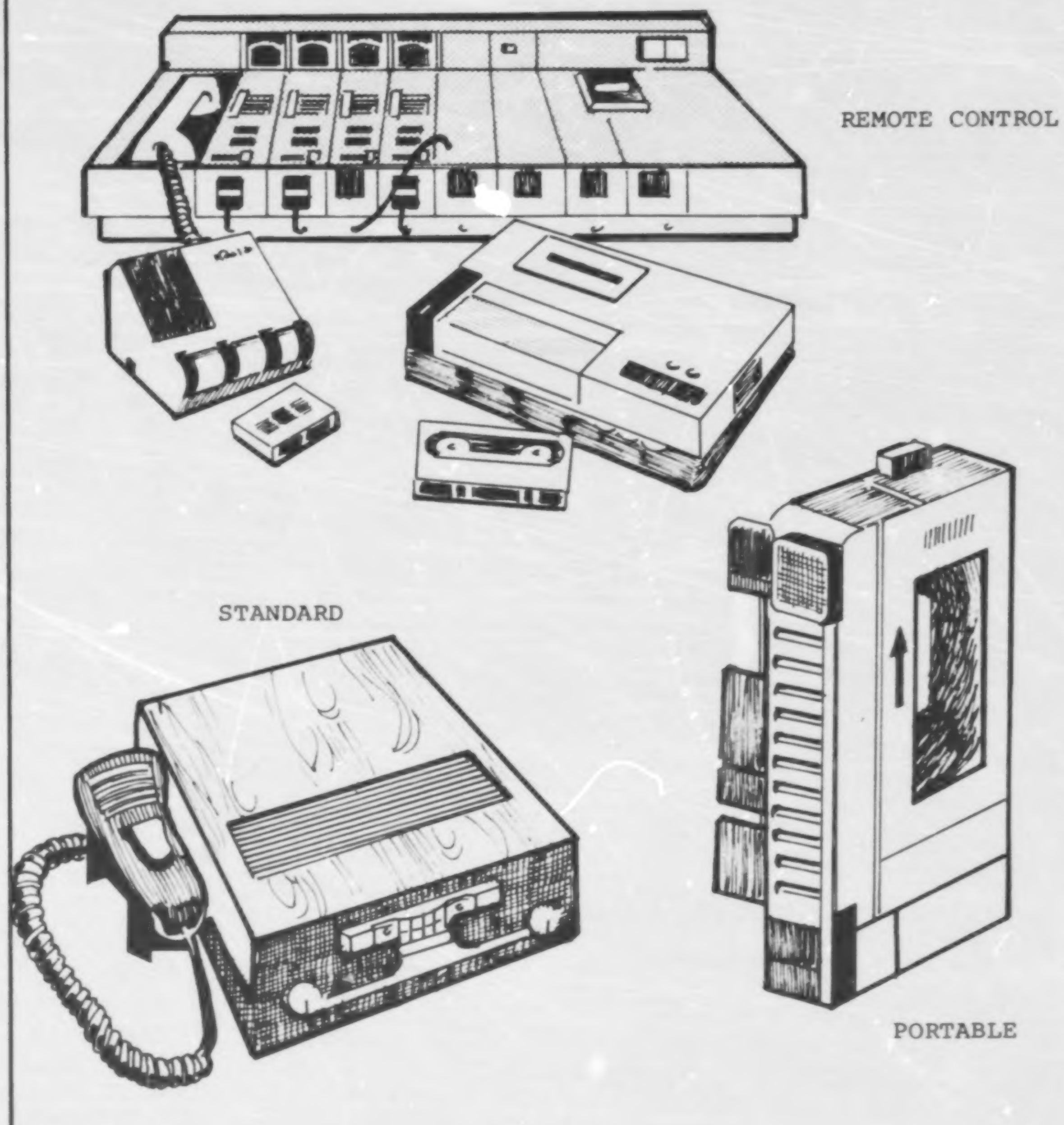
B. Points to consider

1. Many times the speaker's voice is difficult to hear because of surrounding noise in the office.

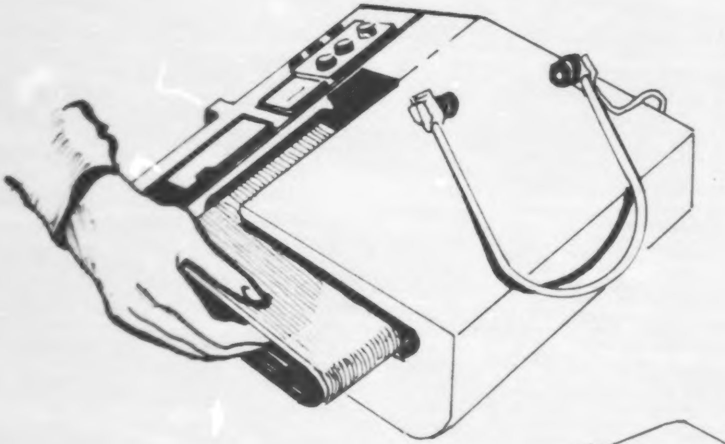
2. The speaker's voice may sound weak or muffled.

3. Rough drafts must be typed until the transcriber is skilled in judging letter length.

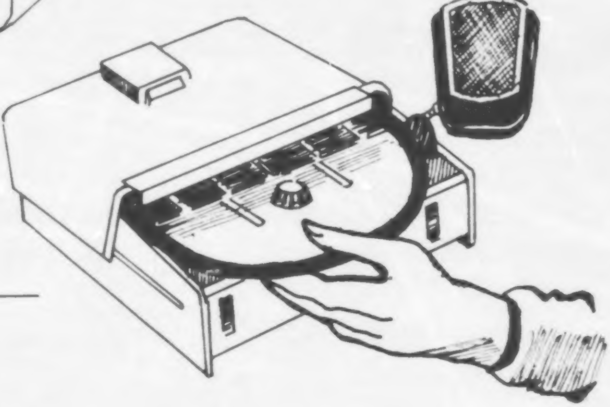
STYLES OF DICTATING - TRANSCRIBING MACHINES



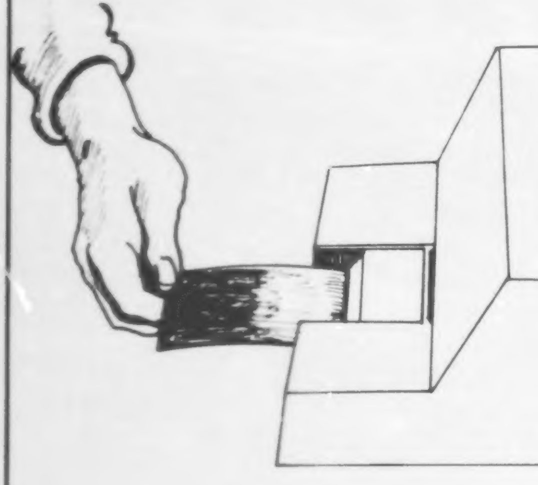
TRANSCRIBING MACHINES



BELT



DISC



CARD

INDICATOR SLIP

INSTR. #	**SIDE NO:**
LTR. H 0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20	**DICT. BY:** **DATE:**

14.0303-XVI-TM-3

XVI-677

TRANSCRIBING

14.0303-XVI-TM-4

XVI-679

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UNIT XVI

OPERATING THE TRANSCRIBING MACHINE

JOB SHEET #1--TRANSCRIBING A ROUGH COPY

I. Tools and equipment needed:

   A. Transcribing machine and accessories

   B. Tape, disc, or belt containing information to be transcribed (Obtain from teacher.)

   C. Typewriter

   D. Typing paper

II. Procedure:

Assume you are a new employee of the Jansen Building Association. One of your frequent tasks will be to transcribe letters sent to you by Mr. Jansen as he is often away from the office at meetings and conventions. Since you have just begun, he prefers a rough draft of the transcription for him to evaluate before you type the final copy. He feels that in this way you will learn his style of dictation and know what to listen for when typing mailable copy from the transcribing machine.

Type all the letters on the transcribing machine in rough draft as efficiently as possible without starting over.

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UNIT XVI

OPERATING THE TRANSCRIBING MACHINE

JOB SHEET #2--TRANSCRIBING A MAILABLE COPY

I. Tools and equipment needed:

   A. Transcribing machine and accessories

   B. Tape, disc, or belt containing the letter to be transcribed (Obtain from teacher.)

   C. Typewriter

   D. Typing paper

   E. Carbon paper

   F. Second sheet

   G. Correcting materials

   H. Envelope

II. Procedure:

Assume you are now aware of the boss's style of dictation and are ready to transcribe your first letter in mailable copy form. A carbon copy is needed for the files and an envelope must be typed. Transcribe only the first letter on the transcribing machine with the utmost emphasis on accuracy. Remember Mr. Jansen will only sign mailable copy work now and he does not want to have to correct any errors.

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UNIT XVI

OPERATING THE TRANSCRIBING MACHINE

JOB SHEET #3--BOOKLET

I. Tools and equipment needed:

- A. Typing supplies and typewriter
- B. Construction paper (2 sheets)
- C. Classroom and library resources
- D. Camera or company brochures
- E. Paper and pencil
- F. Glue, scissors, tape, and stapler

II. Procedures:

- A. Research classroom and library resources for information, pictures, etc. on transcribing machines.
- B. Prepare rough drafts of all written work.
- C. Copy or cut out pictures and tape them on sheets of paper in an attractive display coordinated with the written information. Take pictures of the transcribing machines to be seen on the field trip or obtain company brochures from that business or by writing the producers. These may also be used in the pictorial section of the booklet.

  (Examples of pictures: belts, discs and tapes; various brands and styles of machines; typist sitting at the machine; partially completed letters in the machine.)
- D. Upon approval of the teacher, type the information in a neat, attractive form.
- E. Glue pictures on correct pages and type headings on these pictorial display pages.
- F. On one sheet of construction paper, design an attractive booklet cover. The second sheet will be used for the last page of the booklet.

G. Collate the booklet and then type page numbers on each page.

H. A table of contents should then be typed and inserted at the beginning of the body of information.

I. At this point staple the information together.

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UNIT XVI

OPERATING THE TRANSCRIBING MACHINE

ANSWERS TO JOB SHEETS

Job Sheet #1

Evaluated to the satisfaction of the instructor.

Job Sheet #2

Evaluated to the satisfaction of the instructor.

Job Sheet #3

Evaluated to the satisfaction of the instructor.

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UNIT XVI

OPERATING THE TRANSCRIBING MACHINE

UNIT TEST

1. Discuss the styles of dictating-transcribing machines.

2. Differentiate between the types of transcribing machines.

4. List the advantages and disadvantages of transcribing machines.

5. Demonstrate the ability to:
   a. Operate a transcribing machine.
   b. Type a mailable copy from a transcribing machine.

   (NOTE: If the skills have not been accomplished prior to the test, ask the instructor when they should be completed.)

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UNIT XVI

OPERATING THE TRANSCRIBING MACHINE

ANSWERS TO UNIT TEST

1. There are three main styles of dictating-transcribing machines: portable units, standard units, and remote control units.

   The portable units are small transistorized units which provide the executive with the equipment needed to dictate at home, in the car, or on a trip.

   The standard units come in two styles: separate machines and combination units. In the office that uses separate machines, the executive has one machine on his desk for dictating and the secretary has a different machine on her desk for transcribing. The combination unit is one machine which performs both the dictating and the transcribing.

   Remote control units are a network of equipment which provides a way for executives throughout a company to use the services of a central dictation and transcription facility.

2. Dictating-transcribing machines may have one of three types of belts and one of two types of devices used in transmitting the dictation.

   The plastic belt or disc is an excellent type in that it is inexpensive, it is easily filed or mailed, and it has an indicator of the approximate number of words dictated and any errors.

   The magnetic belts are good in that they are reusable because they can be erased electronically. They can also be filed or mailed easily; however, mail processing must be done by hand because electronic devices sometimes used can erase the dictation.

   The magnetic tape transcribing machines have the advantage of holding a large amount of dictation; however, they are easily mistakenly erased and it is many times difficult to judge the length of the dictation.

3. In order to be as effective as possible, the secretary should remember to follow these steps when transcribing from the dictating-transcribing machine:

a. Put on ear pieces or headsets.

b. Place dictation recorded on the transcribing machine.

c. Place the indicator slip in the slot provided.

(NOTE: The indicator slip is a guide for efficient transcription of certain information, such as the length of the letter.)

d. Adjust controls - speed, volume, and tone.

e. Listen to corrections and special instructions before transcribing any of the dictated material.

f. Use the indicator slip as a guide for the proper placement of the material to be transcribed.

g. Be sure to understand the meaning of dictation before typing so that you will avoid errors in grammar, errors in punctuation, errors in spelling or confusion of homonyms, such as dear and deer.

h. Develop the ability to retain dictation in your mind.

i. Develop the ability to keep the typewriter moving as the transcribing unit stops.

j. Develop the ability to use the typewriter parts advantageously.

k. Develop skillful proofreading.

4. There are three main advantages in using the transcribing machines: one is that dictating machines enable your employer to dictate whenever he needs to do so; another is that dictating-transcribing machines are less time-consuming than other methods of recording information; and the final one is that your employer can take a portable machine with him on trips and send the recordings back to the office to be transcribed.

The main disadvantages are that the speaker's voice may be hard to hear because of the noise surrounding the office; the speaker's voice may sound weak or muffled; rough drafts must be typed until the transcriber is skilled in judging letter length.

5. Evaluated to the satisfaction of the instructor.

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

TERMINAL OBJECTIVE

After completing this unit, the student will be able to define terms associated with mailing procedures, describe mailing equipment, explain procedures for handling incoming and outgoing mail, and identify postal pamphlets and publications. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student will be able to:

1. Define terms associated with mailing procedures.
2. Match the names of various pieces of mailing equipment with descriptions of each.
3. List, analyze, and describe appropriate procedures used in sorting and routing incoming mail.
4. List in sequential order the procedure used in opening the mail.
5. Identify true statements about the procedures involved in removing contents from envelopes.
6. Determine the circumstances for attaching an envelope to the back of a letter.
7. State the procedure used in dating the mail.
8. List five types of mail that are registered and four reasons why dated mail registers should be kept.
9. Discuss attitudes toward screening mail.
10. Explain why it is necessary to read, underline, and annotate the mail.
11. Arrange items of mail for employer in the order of importance.

12. Identify true statements about the procedures used in typing letters and postal cards for OCR processing.

13. Differentiate between the procedures used in folding letters to fit small (6 1/4 - 6 3/4) envelopes and folding letters to fit large (9, 10, 11") envelopes.

14. Cite two methods of affixing stamps.

15. Cite the procedure for obtaining a postage meter, explain the function a postage meter performs, and list the advantages of using a postage meter.

16. Explain how several envelopes can be moistened for sealing at one time.

17. Identify true statements about the procedures used in checking the outgoing mail.

18. Identify the four categories used in presorting mail.

19. List seven suggestions which would be helpful in saving postage.

20. List seven suggestions made by the U. S. Postal Service to speed the handling of mail.

21. Explain the difference between a (a) mailing list, (b) mailing lists on file cards, (c) up-to-date mailing lists, and (d) metal or stencil plates.

22. Identify correct statements about handling interoffice mail.

23. Match terms used in classifying mail with definitions.

24. Identify a correct statement concerning special mailing services when given multiple choices.

25. Describe a mailgram.

26. Define the difference between certificate of mailing, certified mail, and return receipts.

27. Explain how to follow up on lost mail.

28. Explain the procedure for forwarding mail.

29. List and explain two kinds of official mail.

30. Demonstrate the ability to:

    a. Prepare packages for mailing.

b. Select and use packing materials.

c. Utilize ZIP Code directory and type envelopes for mailing.

d. Fold and correctly insert letters into envelopes.

e. Record, route, classify and sort incoming mail.

f. Select correct type of shipping needed for individual items.

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

SUGGESTED ACTIVITIES

I. Instructor:

  A. Provide objective sheet.

  B. Discuss objective sheet.

  C. Provide information sheet.

  D. Discuss information sheet.

  E. Discuss transparencies.

  F. Demonstrate and discuss procedures outlined in the assignment sheets and job sheets.

  G. Provide forms, guides, assignment sheets, and job sheets.

  H. Give test and evaluate results.

II. Student:

  A. Read objective sheet.

  B. Study information sheets.

  C. Participate in discussion of information sheets.

  D. View transparencies.

  E. Read assignment sheets.

  F. Complete assignment sheets.

  G. Read job sheets.

  H. Complete job sheets.

  I. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objectives

  B. Information sheet

  C. Transparency masters

    1. XVII-TM-1--Routing Slip

    2. XVII-TM-2--Folding and Inserting Letters

    3. XVII-TM-3--Packing Items

    4. XVII-TM-4--Wrapping Items

    5. XVII-TM-5--State Abbreviations

  D. Assignment sheets

    1. Assignment Sheet #1--Materials Used in Packaging

    2. Assignment Sheet #2--Preparing Packages for Mailing

  E. Answers to assignment sheets

  F. Job sheets

    1. Job Sheet #1--Typing Envelopes Using State Abbreviations and ZIP Codes

    2. Job Sheet #2--Folding and Inserting Letters

    3. Job Sheet #3--Recording, Routing, Classifying, and Sorting Incoming Mail

    4. Job Sheet #4--Determining Correct Shipping Methods

  G. Answers to job sheets

  H. Test

  I. Answers to test

II. References:

  A. Archer, Fred C., Raymond F. Brecker, and Jeffrey R. Stewart. General Office Procedures. 4th ed. New York: Gregg Division, McGraw-Hill Book Company, 1975.

B. Gregg, John Robert and others. *Applied Secretarial Practice*. 6th ed. New York: Gregg Division, McGraw-Hill Book Company, 1968.

C. Hanna, J. Marshall, Estelle L. Popham, and Rita Sloan Tilton. *Secretarial Procedures and Administration*. 6th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

D. Meehan, James R., William R. Pasewark, and Mary Ellen Oliverio. *Clerical Office Procedures*. 5th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

E. Meehan, James R., Mary Ellen Oliverio, and William R. Pasewark. *Secretarial Office Procedures*. 8th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

INFORMATION SHEET - SECTION I

I. Terms

   A. Processing incoming mail--The act of sorting, routing, opening, removing contents, attaching envelope, dating, registering, screening, and annotating incoming mail

   B. Preparing outgoing mail--The act of preparing envelopes, folding and inserting letters, affixing required stamps or using postage meter, sealing envelopes, checking, and presorting for mailing

   C. Postal Services--Includes classification of mail, special mailing services, official mail, and postal information

II. Equipment

   A. Automatic Envelope Openers--Machines which cut a thin piece off the edge of envelopes as they are fed into the machine by the operator

   B. Mail Inserting Machine--A machine which will automatically stuff 6,000 envelopes an hour

   C. Folding Machine--A machine which can fold sheets automatically at rates up to 18,000 an hour

   D. Postage Meter or Automatic Mailing Machine--A machine which can print postage, add a postmark and seal an envelope in one operation. As many as 250 letters a minute can be stamped, sealed, and stacked by some models.

   E. Elliott Addressing Machine--A high speed automatic addressing machine which uses stencil address plates for addressing cards and envelopes

   F. Addressograph--A high speed automatic addressing machine which uses permanent metal plates. Classification tabs make possible the automatic selection of plates as they pass through the machine, so that forms, envelopes, magazines, and mailing pieces may be selectively addressed.

G. OCR--Optical Character Reader is a machine which can electronically sort letters and postal cards faster than they can be sorted manually.

H. Postage Scale--A scale used to weigh letters to determine correct postage needed. Larger models are used to weigh parcels.

I. Collator--A machine which automatically assembles sheets in proper order for binding

J. Time Stamp--A device which prints the year, month, date, hour, and minute of receipt of letters, telegrams, and other documents

III. Sorting and routing incoming mail

A. In a small office one individual may sort and deliver mail to various individuals and departments.

B. In a large company, the mail is sorted by departments by means of sorting bins or trays. After it has been sorted, it is delivered by the mail clerk or messenger.

C. Telegrams, Mailgrams, special delivery, registered, insured, and certified mail are handled promptly upon receipt.

D. The remainder of the mail should be sorted as follows:

1. First class mail

2. Interoffice mail

3. Bulk mail such as newspapers, periodicals, books, catalogs, circulars, and merchandise

E. The mail marked "Personal" should be separated and delivered to specific addressed individuals.

IV. Opening the mail (except personal or confidential letters)

A. Open telegrams, registered mail, and special delivery first. If there are only a few, these may be opened with a hand letter opener. If there are many, the envelopes may be opened by machine.

B. Sort other envelopes according to size, keeping the same size envelopes together.

C. Take a handful of envelopes of approximately the same size and tap them on a desk or table so the contents will drop to the bottom of the envelopes.

D. Turn the envelopes upside down lightly to get the top edges even so that they may be run through the letter-opening machine.

E. Open the letters by running them through the letter-opening machine which takes off a narrow slice at the top of the envelope. If a machine is not used to open the envelopes, the top of each envelope should be slit with a hand letter opener.

V. Removing the contents of the envelopes

A. The work space should be organized so that there is a clear area for sorting and stacking the mail after opening. All supplies, such as pins, paper clips, gum bands, rubber stamps, time stamp, stapler, colored pencil, transparent tape, and routing forms, should be handy.

B. Contents of each envelope should be removed as follows:

1. Place the envelopes to be opened in front of you with the backs of the envelopes up and the opened edges to the right if you are right-handed.
2. Remove the contents, place the empty envelope on your left, unfold the letter, and fasten any enclosures to it.
3. Attach any small enclosures to the front of the letter. Enclosures larger than the letter should be attached to the back. If any enclosures mentioned in the letter are missing, write "No" beside the enclosure notation on the margin of the letter.
4. Be sure the name and return address of the sender are given in the letter before discarding the envelope or going ahead to the next one. If not given, the envelope should be attached to the back of the letter.
5. Mend the letter or other content of the envelope with tape if it has been cut in the process of opening.
6. If mail is opened by mistake, the envelope should be resealed with cellophane tape, marked "Opened by Mistake," and initialed.

VI. Attaching the envelope

A. Attach the envelope to the back of the letter in any of the following situations:

1. An envelope is incorrectly addressed. It may be necessary to mention the correct address in future correspondence or as an explanation of why the letter was not answered more promptly.

2. A letter was missent by the post office and had to be forwarded. This information is needed to explain the reason for a delayed answer.

3. A letter does not contain a return address.

4. The return address in the letter differs from that on the envelope.

5. The date of the letter differs too much from that on the envelope.

6. Neither a handwritten nor a typewritten signature appears in the letter. The name of the sender may appear as part of the return address on the envelope.

7. A letter specified an enclosure that was not attached to the letter nor found in the envelope.

8. A letter contains a bid, or an offer or acceptance of a contract. The postmark date may be needed as legal evidence.

VII. Dating the mail

A. Incoming mail should be marked with the date and time received by using a pen, pencil, rubber stamp, or a time stamp machine.

VIII. Registering the mail

A. It is often desirable for the clerical worker (or secretary) to keep a mail register of important mail for follow-up or tracing purposes. The mail register is used to record the following:

1. Incoming mail such as registered, certified, special delivery, or insured

2. Expected (separate-cover) mail

3. Mail that is circulated to the executive's associates

4. Telegrams and cables

5. Mail which contains cash or checks

B. It is important to know the date on which each piece of mail is received for the following reasons:

   1. It furnishes a record of the date of receipt.

   2. It furnishes a stimulus to answer the mail promptly.

   3. A letter may have arrived too late for anyone to take care of the matter to which it refers.

   4. The letter may be undated. The only clue to its date is the date of receipt.

IX. Screening the mail

A. Attitudes toward screening the mail

   1. Some executives want to see all the incoming mail and should do so if they desire.

   2. Some executives want their secretaries to screen the mail so that all items that should be handled by subordinates or by personnel in other departments is separated from their mail.

X. Reading, underlining, and annotating the mail

A. Each letter should be read through once and scanned for important facts. Calendar notations should be made.

B. Words and phrases should be underlined which will call attention to the main portion of the letter.

C. Necessary or helpful notes should be annotated (written in the margin). Marginal annotations come under two headings:

   1. Suggested disposition of routine letters, such as "File," "Ack." (for acknowledge), etc.

   2. Special notes, such as "See our last letter attached" (which the secretary will have removed from the files and attached to the annotated letter)

   (Since original letters are sometimes copied on machines and sent outside the organization, an executive may request that no writing be done on the face of the letter and that all annotations be written on the back.)

XI. Arranging mail for employer

Mail should be placed on employer's desk in order of importance.

A. Telegrams

B. Special delivery letters

C. Regular mail

D. Advertising literature

E. Magazines and newspapers

INFORMATION SHEET - SECTION II

XII Typing envelopes, cards, and mailing labels

A. To benefit from rapid processing provided by an Optical Character Reader, letters and postal cards must be typed in the following manner:

1. Mailing address must be typed slightly below the horizontal center of the envelope or card. The address must be typed with single spacing regardless of the number of lines it contains. Also, each line must be blocked.

2. The city, state, and ZIP Code must be typed on the bottom line of the mailing address. Two-letter state abbreviation must be used. One blank space precedes the ZIP Code. The street address or post office box number is typed on the next to the last line. An apartment number or room number, if used, should follow the street address, separated by a comma. Below are examples of correctly typed mailing addresses.

   Dr. John Jones
   1673 Hamilton Avenue, Suite 333
   Big Spring, TX 79720

   Miss Mary Smith
   Advertising Department
   Sterling Products
   2121 West Avenue J
   New York, NY 10012

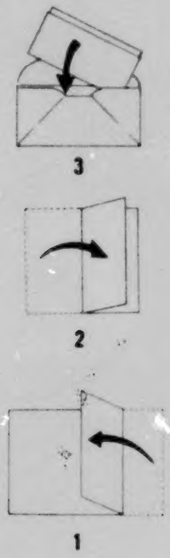
3. A return address, if not printed on the envelope, should be typed in the upper left corner.

4. Any on-arrival directions, such as Personal, Hold for Arrival, or Please Forward, should be typed on line nine (or four lines below the return address). Each main word should begin with a capital letter, and all the words should be underscored.

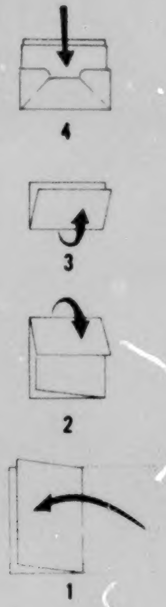
5. Any special postal directions, such as SPECIAL DELIVERY or REGISTERED, should be typed in all capitals on line nine in the upper right corner of the envelope--below the stamp.

XIII. Folding and inserting letters

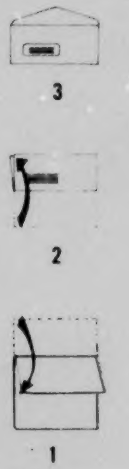
The proper method of folding letters and inserting them in small (No. 6 3/4), large (No. 10), or window envelopes, is illustrated below. Window envelopes do not require addressing but letters must be folded so that the address is visible through the window. All creases should be straight and free from smudges.



LARGE ENVELOPES



SMALL ENVELOPES



WINDOW ENVELOPES

XIV. Affixing stamps

A. A hand-stamp machine may be used for quickly affixing stamps. The machine moistens and affixes a stamp every time the plunger is depressed.

B. If a hand-stamp machine is not available, stamps may be affixed as follows:

1. Stack envelopes face up.
2. Using a strip of stamps, pass each stamp over a stamp moistener.
3. Stamp the top envelope and detach the strip.
4. Set the envelope aside and continue in the same manner.

XV. Using postage meters

A. Postage meters print postage, add a postmark, and seal an envelope in one operation.

B. The postage machine prints postage on a gummed tape for use in mailing packages.

C. A company obtains a postage meter by first getting a license and paying for a certain amount of postage in advance. This is done at the post office, where the meter is set so that it will lock after the fixed amount of postage is used. The postage meter is periodically taken to the post office, where additional postage is purchased and the meter dials are reset.

D. Advantages of using a postage meter are as follows:

1. Time saving when there is a bulk of mail
2. Eliminates the possibility of stamps becoming detached in transit.
3. Speeds the dispatch of letters, since metered mail does not have to be canceled at the post office.
4. Provides company control of its stamp supply so that company stamps are seldomly used for the employee's personal mail.

XVI. Sealing the mail

If several envelopes are to be sealed manually, five or six should be overlapped at a time on the mailing table so that only the gummed flaps are exposed. A moistener is then run over the flaps and the envelopes are then closed and sealed.

XVII. Checking the outgoing mail

Before outgoing mail is released, it should be checked to be sure that:

A. Every letter is signed.

B. The name, address, and ZIP Code are typed correctly on both the outgoing letter and the envelope and are in agreement.

C. The "Attention of . . ." notation, if needed, is typed on the second line of the address on the envelope.

D. The extra carbon copies are addressed to the proper persons, and that the appropriate name has been checked on the carbon copy notation before the copy is put into its envelope.

E. A file number, policy number, or department number appears on the letter if the letter being answered requires such a reference.

F. All enclosures are in the envelope and that there are proper enclosure notations typed on the letters.

G. Special notations such as SPECIAL DELIVERY, REGISTERED, PERSONAL, CONFIDENTIAL are included on the envelope.

H. All personal and confidential mail is sealed.

I. Labels have been typed for bulky mail being sent separately.

XVIII. Presorting mail

Before depositing mail, it should be separated into major categories such as local, out-of-town, precanceled, and metered. It can then bypass one or more preliminary handlings in the post office.

XIX. Cutting mailing costs

A. The following suggestions should be helpful in saving postage:

1. Maintain up-to-date address lists, continually correcting all lists that may involve changes in addresses.
2. When unsure of the correct amount of postage, weigh the mail to avoid wasted postage or mail delayed by insufficient postage.
3. Obtain up-to-date rate charts from postal authorities.
4. Use special delivery service to small towns judiciously, as small post offices do not always provide such service or may give it only during post office hours.
5. Except for urgent items, combine in one mailing at the end of the day all mail addressed to the same person or the same branch office.
6. When sending reply-requested mail, use business reply envelopes rather than stamped envelopes, thus paying postage only on the envelopes actually returned.
7. Use Special Handling rather than Special Delivery for packages except in case of emergency.

XX. Speeding the mail

A. To speed the handling of mail, the U.S. Postal Service suggests that:

1. All mail have ZIP Code.
2. Mail be deposited as early as possible, preferably during the morning hours and frequently throughout the day.
3. Letters be arranged so that all addresses face the same way.
4. Long envelopes and short envelopes be bundled in separate packages.
5. Special delivery letters be separated from bundles of ordinary mail.
6. First-class and third-class mail not be mixed.
7. Metered mail that does not require cancellation be separated from stamped mail.

INFORMATION SHEET - SECTION III

XXI. Volume mailings

A. Mailing list--Many firms keep lists of their customers, prospective customers, subscribers, clients, or others to whom they address mail repeatedly. A firm may use a number of mailing lists for different purposes (i.e. to advertise a new product, to announce a new service, or to institute a new policy.) Special mailing lists of all kinds of prospective buyers, both nationwide and regional, can be purchased.

B. Mailing lists on file cards--The names and addresses of a mailing list are frequently kept on 5" x 3" cards that are filed in alphabetic order. These cards may be grouped under various classifications. The cards may also be filed by subject (the subject that the prospective customer has been interested in or may be interested in later).

C. Up-to-date mailing lists--The names on all mailing lists are constantly changing as newcomers move into the sales area and others move out. Additions, deletions, and corrections of names and addresses should be made whenever the information is received. The post office will assist in maintaining an up-to-date mailing list. For a small fee it will also supply the ZIP Codes for an entire mailing list.

D. Metal plates or stencil plates--When a list consists of more than a thousand names, addressing of sales and other promotional literature is facilitated by the use of embossed or stencil plates. High-speed machines like the Elliott Addressing Machine and the Addressograph are among the numerous business machines available today for processing large volumes of mail.

XXII. Handling interoffice mail

In many businesses there is a large volume of internal mail that passes among the various departments, offices, and branches. Most of it does not even leave the building. In order to deal with interoffice mail efficiently, many procedures have been devised along the lines of the ones listed below:

A. Interoffice messages are prepared on special stationery known as interoffice memorandum forms.

B. Interoffice memorandums may be dispatched without envelopes, especially if they contain no confidential information and if they are to be delivered to some office in the same geographic location.

C. When envelopes are required, informal and reusable ones can be used.

D. If several pieces of interoffice mail are addressed to the same person at a distant branch, all the pieces can be assembled for dispatch in a single envelope.

E. Interoffice mail generally moves quickly. Interoffice items not enclosed in envelopes are date-stamped and routed at once according to the instructions on the heading.

XXIII. Classes of mail

A. First-class mail--Includes written or typewritten matter, such as letters, carbon copies, postal cards, and private mailing cards, as well as material sealed against postal inspection. The rate for letters and first-class packages of 12 ounces or less is based on weight by the ounce or fraction of an ounce. First-class items over 12 ounces are considered priority mail. First-class mail travels by air unless it is for local or area delivery.

B. Preferred or priority mail--Has guaranteed overnight delivery within a 200-mile radius and two-day delivery within 300 miles. This class replaced Airmail. Both preferred and first-class mail travel by air.

C. Second-class mail--Includes newspapers, magazines, and other periodicals. Rates for second-class mail should be checked at the post office since they vary somewhat for individual and bulk mailings and are subject to change.

D. Third-class mail--Is used for the individual and bulk mailing of printed circulars, books, catalogs, merchandise, and miscellaneous printed matter weighing less than 16 ounces. Third-class matter is usually mailed unsealed for easy inspection by postal authorities. Non-profit organizations can secure a permit from the post office authorizing them to mail third-class matter in bulk at a reduced rate.

E. Fourth-class mail--Commonly known as parcel post, and is used for the shipment of merchandise and printed matter weighing 16 ounces or more. The United States is divided into eight zones for fourth-class delivery, and rates are based on the zone in which the addressee is located and on the weight of the parcel. If a written message is included in a parcel post shipment, the parcel must be marked "Letter Enclosed," and first-class postage for the letter must be paid in addition to the fourth-class mailing charge for the package. A first-class letter may be stamped and attached to the outside of the package. Messages descriptive of the contents of the parcel, such as invoice, sales slip, or packing slip, are permitted inside fourth-class mail at no extra charge. The attached post office pamphlet, "How to Pack and Wrap Parcels for Mailing," illustrates how to prepare parcels for mailing.

F. International mail--Mail addressed to locations outside the continental United States or its territories, or its possessions. Such mail may be transported by air or by surface transportation with rates based on the type of mail involved, its weight, and the country of destination. Since weight limitations are strict and the corresponding rates are relatively high for international correspondence, letters to foreign countries should be written or typed on lightweight stationery. To avoid delays, most business letters to foreign countries are sent airmail.

XXIV. Special mailing services

The U.S. Postal Service offers five types of special services to speed and ensure the safe delivery of mail, and fees charged for these services are in addition to the regular postage.

A. Special delivery includes all classes of domestic mail. That which is marked "Special Delivery" is separated from regular mail and is usually delivered by messenger as soon as it is received at the post office that serves the addressee. This mail is handled the same as first-class mail except that it may be delivered more promptly.

B. Sending valuables through the mail

1. Insured mail includes third-class, fourth-class, and air parcel post (priority mail) containing printed matter or merchandise in amounts up to $200. Insured mail is handled as ordinary parcel post and, for articles insured for more than $15, a receipt of delivery is obtained by the post office from the addressee for postal department files. (Irreplaceable articles, regardless of value, and all items of more than $200 value, should be sent by registered mail.

2. Registered mail is the safest way to send valuables. The full value of the mailed item must be declared when mailed for security and insurance purposes. Included in the registration fee is insurance protection up to $10,000 for domestic mail only. A receipt is received by the mailer and the movement of the mail is controlled throughout the postal system. For an additional fee, a return receipt may be obtained showing to whom, when, and where merchandise or printed matter has been delivered.

3. Collect-On-Delivery service may be used when merchandise has been ordered by the addressee. The amount due the mailer for the merchandise, postage, and the money order fee are collected from the addressee. First-, third-, and fourth-class mail may be sent C.O.D. Fees charged for C.O.D. service include insurance protection against loss or damage. C.O.D. may also be sent as registered mail. The maximum amount which may be collected from the addressee on C.O.D. mail is $200.

4. Money orders, available at all post offices, are a safe way to send money through the mail and may be purchased in amounts to $300. If a money order is lost or stolen, it will be replaced.

5. International money orders are available in amounts up to $100 and may be purchased at all first class post offices.

XXV. Mailgram

This is a service combining telegraph and postal services provided by Western Union, which installs its telegram receiving equipment in some post offices. A postal employee receives the up-to-100 word message from late afternoon through the night and mails it in a window envelope for guaranteed delivery in the first delivery in the morning.

XXVI. Obtaining proof of mailing and delivery

A. Certificate of mailing provides proof of mailing only. It does not provide insurance coverage for loss or damage. The cost is nominal, and no record is maintained at the post office.

B. Certified mail provides a mailing receipt and record of delivery at the addressee's post office. Certified mail does not travel faster than first-class, nor does it offer extra security or payment for loss. A return receipt to provide the sender proof of delivery may be obtained for an additional fee. For security, registered mail should be used.

C. Return receipts provide proof of delivery. These are available on insured mail of more than $15 value, and on certified and registered mail. The return receipt identifies the article by number, who signed for it, and the date it was delivered. For a reasonable additional fee, a receipt may be obtained showing the exact address of delivery, and delivery of the mail may be restricted to the addressee only (state or federal officials excluded).

XXVII. Tracing mail

If mail does not reach its destination at the expected time, the sender may ask the post office to trace it. The post office will supply a form on which to record detailed information needed for tracing.

XXVIII. Forwarding mail

When a person moves within the same city or to a different city, change of address cards should be obtained from the post office to notify all correspondents and publishers of the new address. The effective date of the change should be on the form. First-class mail is forwarded for one year. The post office should be contacted about forwarding other classes of mail, temporary changes of address, and holding mail.

XXIX. Official mail

Federal government offices send out official mail without affixing postage in two ways:

A. Franked mail must have a real or facsimile signature of the sender in place of the stamp and the words Public Document--Free on the address side. Only a few persons are authorized to use the frank, such as the Vice-President of the United States, members and members-elect of Congress, Resident Commissioners, the Secretary of the Senate, and the Sergeant at Arms of the Senate.

B. Penalty mail is used for official government correspondence. It travels in penalty envelopes or under penalty labels.

ROUTING SLIP

ROUTING SLIP

FROM: ____________________ **DATE:** ____________________

TO:
1. ____________________
2. ____________________
3. ____________________
4. ____________________
5. ____________________
6. ____________________

FOR:

- ☐ Approval
- ☐ File
- ☐ Necessary Action
- ☐ Note and Return
- ☐ Recommendation
- ☐ See Me
- ☐ Signature
- ☐ Comment
- ☐ Information
- ____________________

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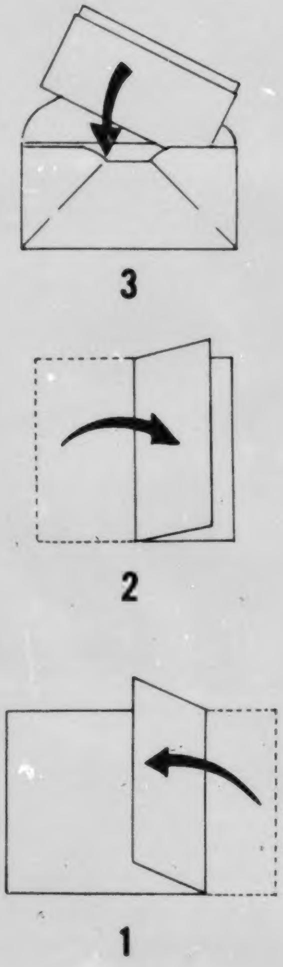
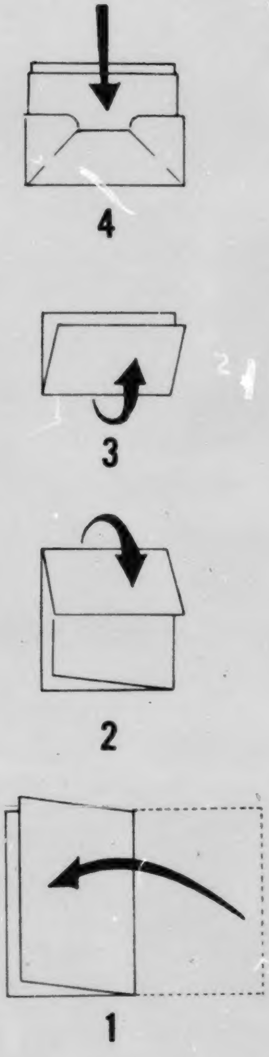
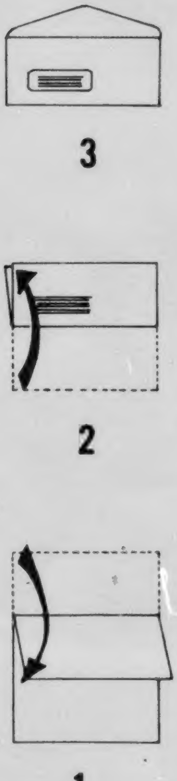
FOLDING AND INSERTING LETTERS INTO ENVELOPES



LARGE ENVELOPES

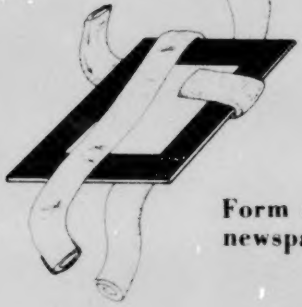


SMALL ENVELOPES

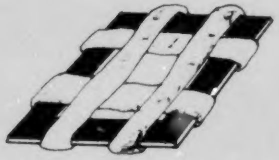


WINDOW ENVELOPES

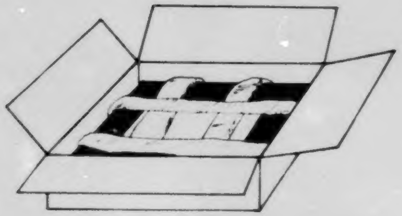
PACKING ITEMS



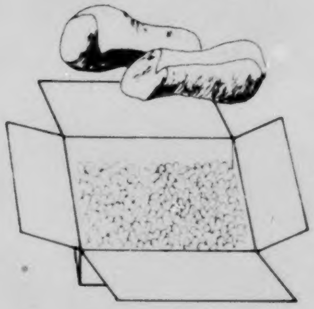
Form rolls from newspapers.



Wrap rolls around frame.

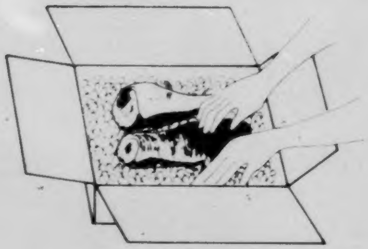


Pack securely in carton.



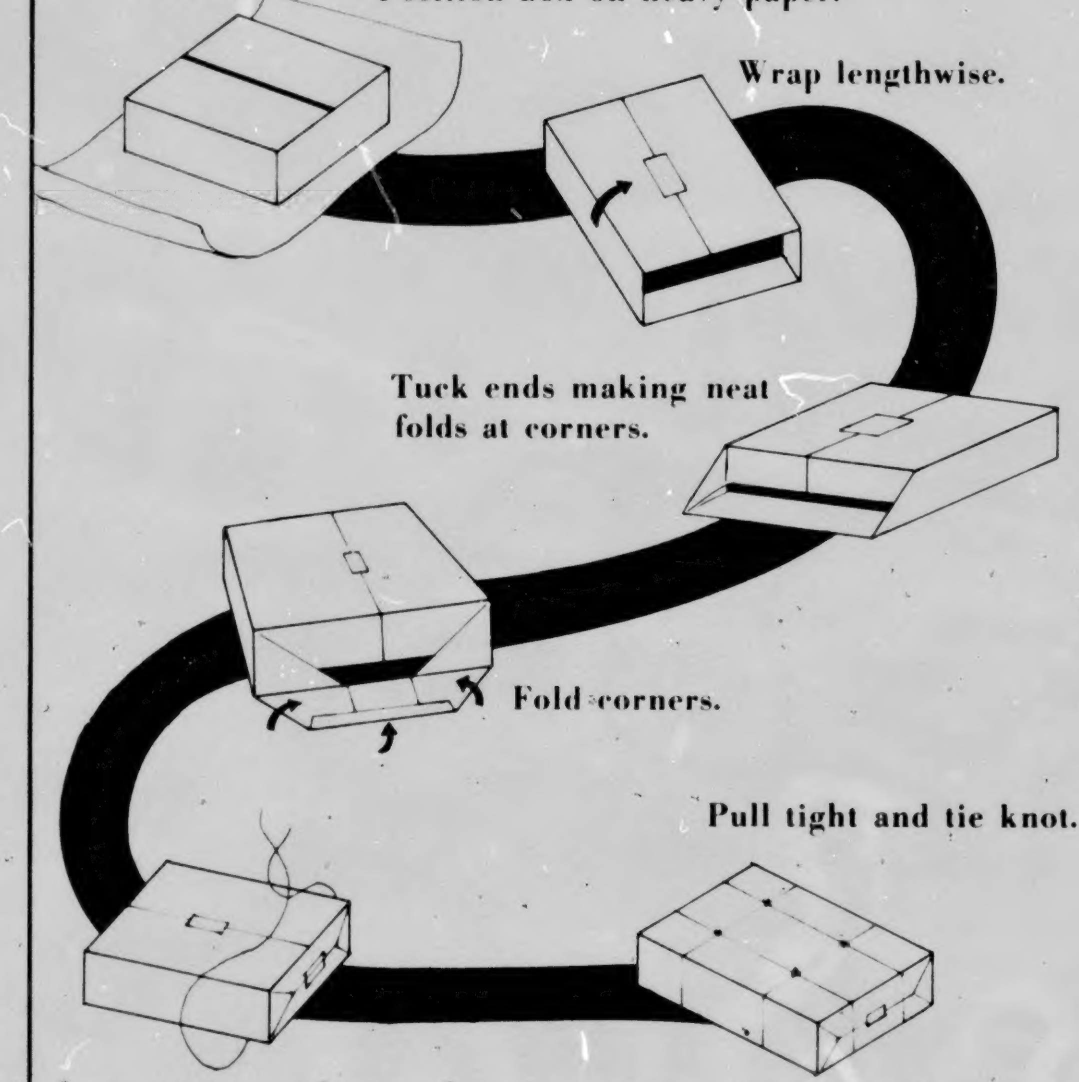
Pack cushioning material in bottom of carton.

Wrap each item separately.



Pack wrapped items in center of carton and pack material around and over.

WRAPPING ITEMS



Position box on heavy paper.

Wrap lengthwise.

Tuck ends making neat folds at corners.

Fold corners.

Pull tight and tie knot.

Loop strong cord around end of parcel; then lengthwise.

Repeat looping cord at each intersection and tie knot.

STATE ABBREVIATIONS

Alabama	AL	Montana	MT
Alaska	AK	Nebraska	NE
Arizona	AZ	Nevada	NV
Arkansas	AR	New Hampshire	NH
California	CA	New Jersey	NJ
Canal Zone	CZ	New Mexico	NM
Colorado	CO	New York	NY
Connecticut	CT	North Carolina	NC
Delaware	DE	North Dakota	ND
District of Columbia	DC	Ohio	OH
Florida	FL	Oklahoma	OK
Georgia	GA	Oregon	OR
Hawaii	HI	Pennsylvania	PA
Idaho	ID	Puerto Rico	PR
Illinois	IL	Rhode Island	RI
Indiana	IN	South Carolina	SC
Iowa	IA	South Dakota	SD
Kansas	KS	Tennessee	TN
Kentucky	KY	Texas	TX
Louisiana	LA	Utah	UT
Maine	ME	Vermont	VT
Maryland	MD	Virginia	VA
Massachusetts	MA	Virgin Islands	VI
Michigan	MI	Washington	WA
Minnesota	MN	West Virginia	WV
Mississippi	MS	Wisconsin	WI
Missouri	MO	Wyoming	WY

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

ASSIGNMENT SHEET #1--MATERIALS USED IN PACKAGING

Directions: Find as many kinds of packing materials as you can. Bring them to class along with a box, tape or string, and labels. Demonstrate to the class how you would utilize your materials.

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

ASSIGNMENT SHEET #2--PREPARING PACKAGES FOR MAILING

1. Listed below are several free pamphlets which are available from the Post Office. Select one to secure and present to your fellow classmates. Prepare samples for your presentation.
   a. "What Mailers Should Do to Get the Best Service" (No. 153)
   b. "Domestic Postage Rates, Fees, Information" (Notice 59)
   c. "International Postage Rates and Fees" (No. 51)
   d. "How to Prepare Second- and Third-Class Mailings" (No. 21)
   e. "How to Address Mail" (No. 28)
   f. "How to Pack and Wrap Parcels for Mailing" (No. 2)
   g. "Refunds of Postage and Special Service Fees" (No. 5)
   h. "Express Mail Service" (No. 163)
   i. "ZIP Code--Abbreviations for Use with ZIP Code" (No. 59)

* Extra credit item

2. Listed below are several publications which may be secured for a small charge from the Superintendent of Documents, Washington, D.C. 20402. Most offices or libraries have one or more of these publications. Ask an office employee or librarian if you can check one out to make a presentation to the class.
   a. Postal Manual gives regulations and instructions governing operation of Postal Service.
   b. Directory of Post Offices contains (1) post offices listed by states with ZIP Codes; (2) post offices listed alphabetically; (3) post offices listed by states; (4) post offices listed by counties; (5) a list of Army and Air Force installations, with post office addresses.

c. Postal Zip Code Directory includes all post offices in each state. Local Zip Code directories are available without charge.

d. Directory of International Mail contains detailed rates and other conditions governing mail to foreign countries.

e. Postal Bulletin is issued weekly and contains timely or transitional instructions and information.

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

Completed to the satisfaction of instructor.

Assignment Sheet #2

Completed to the satisfaction of instructor.

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

JOB SHEET #1--TYPING ENVELOPES USING STATE ABBREVIATIONS AND ZIP CODES

I. Tools and equipment needed:

A. Typewriter

B. ZIP Code directory

C. Ten #10" envelopes

D. Five #6 3/4" envelopes

II. Procedures:

A. Type the following names, addresses and notations on No. 10 envelopes. Determine the correct abbreviations and ZIP Code numbers by using the ZIP Code Directory. Use your own name and return address.

1. Mrs. Lola Williams, 2631 Wilmont, Quinebaug, Connecticut

2. Jack Williams, 6231 Laurie Woods Lane, Decatur, Georgia

3. Harold Stacy, 2621 Ponce DeLeon Rd., Miami, Florida, Personal

4. Miss Kathy Kaiser, 1616 Firewood Dr., Fort Wayne, Indiana

5. Ruby Wayburn Dress Shop, 8622 Parkmont Blvd., Baton Rouge, Louisiana, Personal

6. Creighton Medical School, 639 N. 27th, Omaha, Nebraska, Airmail

7. Joyce Upton, #162 Carlisle Apartments, 150 Moeller, Binghamton, New York, Hold for arrival

8. A. C. Regency, Vice-President, Gaymore Savings and Loan, Beacon Mutual Bldg., 52 W. Gay, Columbus, Ohio

9. Dr. Raymond Gillis, Baptist Memorial Hospital, 5800 N.W. Grand Blvd., Oklahoma City, Oklahoma, Special Delivery

10. Alice Tensley, 2625 Watts St., Cumby, Texas

B. Type the following names, addresses and notations on No. 6 3/4 envelopes. Determine the correct state abbreviations and ZIP Code number. Use your own name and return address.

1. Mrs. Frances Blake, Beauty Consultant, Armway Cosmetic Company, 9766 Miramar Road, San Diego, California, Special Delivery

2. Dr. Betty Filmore, Psychologist, Behrens Memorial Hospital, 446 Piedmont, Glendale, California, Personal

3. Ralph Mason, #627 Eastgate Apartments, 162 E. Ontario, Chicago, Illinois, Please Forward

4. Ms. Judy Hammond, 426 College Ave. N., Indianapolis, Indiana, Special Delivery

5. Rachel Hernandez, 5063 Lowell Drive, Kansas City, Missouri, Personal

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

JOB SHEET #2--FOLDING AND INSERTING LETTERS

I. Tools and equipment needed:

  A. Three sheets of regular letter-size paper

  B. Three envelopes

    1. One No. 6 3/4" or 6 1/4"

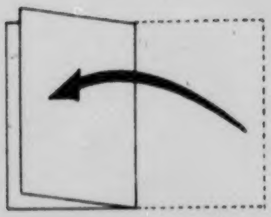
    2. One No. 10"

    3. One No. 10" window envelope

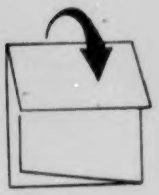
II. Procedures:

  Following the instructions listed below, fold one sheet of paper for each size envelope.

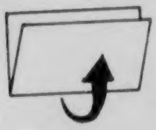
  A. Procedure for folding and inserting letters into small (6 3/4" and 6 1/4") envelope.



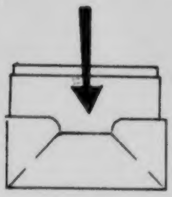
1



2

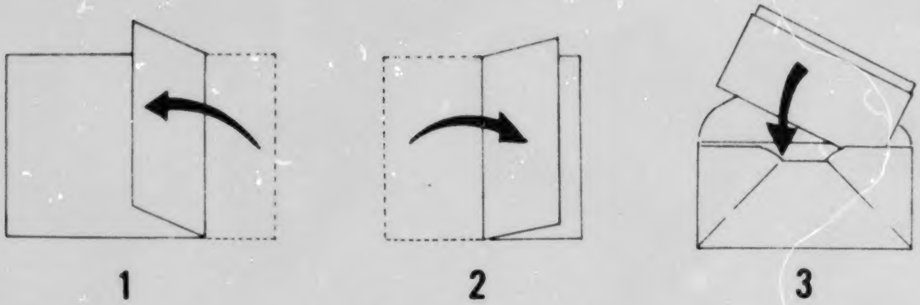


3

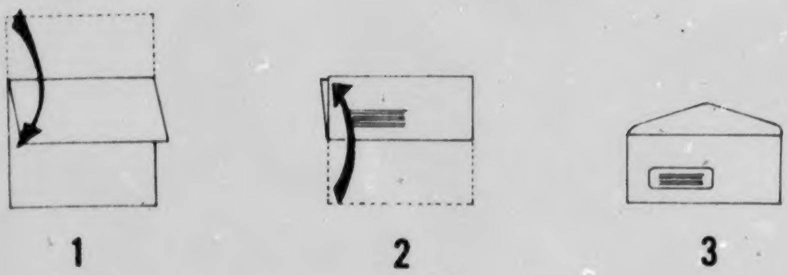


4

B. Procedure for folding and inserting letters into large envelopes



C. Procedure for folding and inserting letters into window envelopes



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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

JOB SHEET #3--CLASSIFYING, ROUTING, AND SORTING INCOMING MAIL

I. Tools and equipment needed:

   A. Pencil or pen

   B. Mail record form

   C. Mail register form

   D. Routing slips

II. Procedures:

   A. You work in a large office as a mail clerk. At 9 a.m. you receive the incoming mail listed below. In the comments column, record the classification of each item (interoffice, first class, preferred, etc.) and complete routing slips if necessary.

	COMMENTS
1. Letter Dr. Smith received yesterday that he would like to have routed to Miss Taylor and Jack Wilson in Purchasing Dept.	
2. Confidential letter to Janice Purdy, Sales Representative	
3. Book for research librarian	
4. Printed price list from Staton Paper Company of St. Louis	
5. Interoffice memos to three vice-presidents	
6. Insured package #262626-3 to Purchasing Dept. from Agnes Halt, Dallas, Texas	
7. Out-of-town newspaper for Rachel Walker, clerk	

	COMMENTS
8. Airmail letter to Personnel Dept.	
9. *Business Week* magazine to secretary, Anna Hays	
10. Pamphlet from Grayson Office Supply Co.	
11. Registered letter #636579 to R. J. Johnson President	

B. Sort the above mail by placing the number of each item in the correct slot.

President	V-President	Purchasing	Sales	Library	Personnel	Office Employ

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

JOB SHEET #4--DETERMINING CORRECT SHIPPING METHODS

I. Tools and equipment needed:

  A. Postal Service Manual

  B. Express and Parcel Post Comparative Rate Guide

  C. Leonard's Guide

II. Procedures:

  A. Study the following items which are to be shipped and determine the best method for shipping. Explain why you would use this method.

    1. 150 lbs. of fresh fish which is needed in city 1,500 miles away

    2. Jewels packed in small box

    3. Steel parts needed for air conditioner in a small town 200 miles away

    4. Package weighing 43 lbs. to be sent 75 miles

    5. Boxed mattress to be delivered 150 miles away

    6. Small package under five pounds to be shipped 2500 miles - speed not important

    7. Manufactured sample parts to be sent to Hawaii

    8. Large package going 700 miles where pickup and delivery is important

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

ANSWERS TO JOB SHEETS

Job Sheet #1

A.	1.	CT	06262
	2.	GA	30034
	3.	FL	33143
	4.	IN	46815
	5.	LA	70816
	6.	NE	68131
	7.	NY	13904
	8.	OH	43215
	9.	OK	73112
	10.	TX	75433
B.	1.	CA	92126
	2.	CA	91206
	3.	IL	60611
	4.	IN	46202
	5.	MO	64129

Job Sheet #2

Perform Job Sheet #2 to the satisfaction of the instructor.

Job Sheet #3

A. Comments

1. Interoffice (routing slip should be completed for these)
2. First-class, private

3. Parcel post
4. Third-class
5. Interoffice
6. Parcel post
7. Second-class
8. Preferred
9. Second-class
10. Third-class
11. Registered, first-class

B.

President	V.President	Purchasing	Sales	Library	Personnel	Office Employ
11	5	1	2	3	8	7
		4				9
		6				
		10				

Job Sheet #4

A. 1. Air express - fastest for heavy freight; can be kept cold; carried on cargo planes.

2. United parcel - direct delivery; receipt upon arrival and insured.

3. Bus express - fast service for city without airport.

4. United Parcel Service - for packages under 50 lbs.; fast, convenient service.

5. Truck transportation - arrange pickup time.

6. Parcel post - cheapest for small packages.

7. Air parcel-post - used to carry merchandise to distant places.

8. REA - fast, convenient, pickup and delivery service.

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

UNIT TEST - SECTION I

1. Define terms associated with mailing procedures.

   a. Processing incoming mail

   b. Preparing outgoing mail

   c. Postal services

2. Match the names of various pieces of mailing equipment with the correct descriptions of each.

   _____ a. Addressograph

   _____ b. Folding Machine

   _____ c. Elliott Addressing Machine

   _____ d. Postage Meter

   _____ e. Mail Inserting Machine

   _____ f. Collator

   _____ g. Automatic Envelope Opener

   _____ h. OCR

   _____ i. Time Stamp

   _____ j. Postage Scale

   1. Optical Character Reader is a machine which can electronically sort letters and postal cards faster than they can be sorted manually.

   2. A machine which automatically assembles sheets in proper order for binding

   3. A device which prints the year, month, date, hour, and minute of receipt of letters, telegrams, and other documents

   4. A scale used to weigh letters to determine correct postage needed. Larger models are used to weigh parcels.

5. Machines which cut a thin piece off the edge of the envelopes as they are fed into the machine by the operator

6. A machine which can fold sheets automatically at rates up to 18,000 an hour

7. A high-speed automatic addressing machine which uses stencil address plates or addressing cards and envelopes

8. A high-speed automatic addressing machine which uses permanent metal plates. Classification tabs make possible the automatic selection of plates as they pass through the machine so that forms, envelopes, magazines, and mailing pieces may be selectively addressed.

9. A machine which will automatically stuff 6,000 envelopes an hour

10. A machine which can print postage, add a postmark, and seal an envelope in one operation. As many as 250 letters per minute can be stamped, sealed, and stacked by some models.

3. Analyze and describe the procedures used in sorting and routing incoming mail.

4. List in sequential order the procedures used in opening the mail.

5. Identify true statements below by placing an "X" to the left of each statement that is true.

_____ a. Work space does not have to be organized, but a place needs to be provided for stacking mail.

_____ b. The only equipment really needed for opening mail is a sharp pair of scissors.

_____ c. When removing contents from envelopes, place the envelopes with the backs up and the opened edges to the right side.

_____ d. Remove the contents, place the empty envelope to left, unfold the letter, and fasten any enclosures to it.

_____ e. Attach small enclosures to the front and large enclosures to the back of correspondence.

_____ f. If no enclosures are included but are mentioned in the correspondence, a "no" should be written in the margin of the letter.

_____ g. As soon as contents are removed, discard the envelope.

_____ h. If mail is opened by mistake, the envelope flap should be glued so no one will know it's been opened.

6. Identify eight situations in which an envelope should be attached to the correspondence.

a.

b.

c.

d.

e.

f.

g.

h.

7. State the procedure used in dating the mail.

8. List five types of mail that can be registered and four reasons why dated mail registers should be kept.

   a. (1)

      (2)

      (3)

      (4)

      (5)

   b. (1)

      (2)

      (3)

      (4)

9. Discuss different attitudes toward screening mail.

10. Explain why it is necessary to read, underline, and annotate the mail.

11. Arrange the following items of mail in the sequential order in which they should be presented to an employer by placing a number (1-5) beside the item. ("1" being the most important and a "5" being the least important)

_____ magazines and newspapers

_____ telegrams

_____ regular correspondence

_____ advertising literature

_____ Special Delivery mail

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

UNIT TEST - SECTION II

12. Identify true statements about the procedures used in typing letters and postal cards for OCR processing by placing an "X" beside the statements that are true.

_____ a. Mailing addresses must be typed two lines above horizontal center of the card or letter.

_____ b. Addresses may be indented and double spaced according to the number of lines the address contains.

_____ c. The city, state, and ZIP Code must be typed on the bottom line of the mailing address.

_____ d. There should be at least four spaces left between the state and the ZIP Code number.

_____ e. If a return address is not printed on the envelope, it should be typed in the upper left-hand corner.

_____ f. Any on-arrival directions, such as Personal, Hold for Arrival, or Please Forward should be typed on line 12.

_____ g. On-arrival directions should be typed in all caps.

_____ h. Any special postal directions, such as "Special Delivery" or "Registered" should be typed in upper and lower case letters on line twelve.

13. Differentiate between the procedures used in folding letters to fit small envelopes and folding letters to fit large envelopes.

14. Cite two methods of affixing stamps.

15. a. Cite the procedure used for obtaining a postage meter.

b. Explain the function a postage meter performs.

c. List the advantages of using a postage meter.

16. Explain how several envelopes can be moistened for sealing at one time.

17. Identify true statements about the procedures used in checking the outgoing mail by placing an "X" beside those statements which are true.

Before outgoing mail is released, it should be checked to be sure that:

_____ a. Every letter has a signature.

_____ b. The name, address, and ZIP Code are typed correctly on both the outgoing letter and the envelope and are in agreement.

_____ c. The "Attention of . . ." notation, if needed, is typed on the fifth line of the address on the envelope.

_____ d. A file number, policy number, or department number appears on the letter if the letter being answered requires such a reference.

_____ e. The extra carbon copies are addressed to the proper persons, and that the appropriate name has been checked on the carbon copy notation before the copy is put into its envelope.

_____f. All enclosures are in the envelope and that there are proper enclosure notations typed on the letters.

_____g. Special notations such as SPECIAL DELIVERY, REGISTERED, PERSONAL, CONFIDENTIAL are included on the envelope.

_____h. All personal and confidential mail is sent special delivery.

_____i. Labels have been typed for mail being sent "To the attention of."

18. Identify the four categories used in presorting mail.

a.

b.

c.

d.

19. List seven suggestions which would be helpful in saving postage.

20. List seven suggestions made by the U.S. Postal Service to speed the handling of mail.

a.

b.

c.

d.

e.

f.

g.

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

UNIT TEST - SECTION III

21. Explain the difference between:

    a. Mailing lists

    b. Mailing lists on file cards

    c. Up-to-date mailing lists

d. Metal or stencil plates

22. Identify correct statements about handling interoffice mail by placing an "X" beside those statements which are correct.

_____ a. In many businesses there is a large volume of internal mail that passes among the various departments, offices, and branches.

_____ b. In order to deal with interoffice mail efficiently, many procedures have been devised.

_____ c. Interoffice memorandums may be dispatched without envelopes, especially if they contain no confidential information and if they are to be delivered to some office in the same geographic location.

_____ d. Interoffice messages are prepared on special stationery known as international office forms.

_____ e. When envelopes are required, informal and reusable ones can be used.

_____ f. If several pieces of interoffice mail are addressed to the same person at a distant branch, all the pieces must be dispatched in separate envelopes.

_____ g. Interoffice mail generally moves quickly. Interoffice items not enclosed in envelopes are date-stamped and routed at once according to the instructions on the heading.

23. Match the terms used in classifying mail with their correct definition by selecting a number in the right column and placing it beside the corresponding terms in the left column.

_____ a. First-class mail

_____ b. Preferred or priority mail

_____ c. Second-class mail

_____ d. Third-class mail

_____ e. Fourth-class mail

_____ f. International mail

1. This class of mail travels by air and postal service guarantees one night delivery within a two hundred mile radius.

2. Is used for the individual and bulk mailing of printed circulars, books, catalogs, merchandise, and miscellaneous printed matter weighing less than sixteen ounces. This matter is usually mailed unsealed for easy inspection by postal authorities. Non-profit organizations can secure a permit from the post office authorizing them to mail in bulk at a reduced rate.

3. Includes written or typewritten matter, such as letters, carbon copies, postal cards, and private mailing cards, as well as material sealed against postal inspection

4. Commonly known as parcel post which is used for the shipment of merchandise and printed matter weighing sixteen ounces or more.

5. Newspapers, magazines and other periodicals are included in this category.

6. Mail addressed to locations outside the continental United States or its territories

24. Each of the following statements is followed by several answers. Only one of these answers is correct. Read each statement carefully and select the answer. Place the number of the answer selected in the corresponding blank space in the right hand column.

_____ a. Special Delivery mail includes:

1. All classes of domestic mail.
2. Mail which is separated from other mail and delivered by messenger.
3. Mail that is handled the same as first-class mail except it is delivered more promptly.
4. None of the above
5. All of the above

_____ b. Insured mail:

1. Is available up to $200 for third-class, fourth class, and air parcel post.
2. Is handled as ordinary parcel post except delivered in special mail bag.
3. Must have a receipt for delivery of goods under $15.
4. None of the above
5. All of the above

_____ c. Registered mail:

1. Is the safest way to send valuables.
2. Requires the full value of the item to be declared when mailed.
3. Provides insurance protection up to $10,000 for domestic mail.
4. None of the above
5. All of the above

_____ d. C.O.D. mail means:

1. Collect-on-delivery service. May be used when merchandise has been ordered by the sales agent.

2. First, third, and fourth-class mail may be sent C.O.D.

3. Fees charged for C.O.D. include transportation costs.

4. None of the above

5. All of the above

_____ e. Money orders:

1. Are a safe way to send checks through the mail.

2. May be purchased at any shopping center.

3. Can be purchased up to the amount of $300 and can be replaced if stolen.

4. None of the above

5. All of the above

25. Describe a mailgram.

26. Define the difference between:

a. Certificate of mailing

b. Certified mail

c. Return receipts

27. State the procedure used to follow up on lost mail.

28. Explain the procedure for forwarding mail.

29. List and explain two kinds of official mail that does not require affixed postage.

30. Demonstrate the ability to:

    a. Prepare packages for mailing.

    b. Select and use packing materials.

    c. Utilize ZIP Code directory and type envelopes for mailing.

    d. Fold and correctly insert letters into envelopes.

    e. Record, route, classify and sort incoming mail.

    f. Select correct type of shipping needed for individual items.

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

ANSWERS TO UNIT TEST - SECTION I

1. a. Processing incoming mail--The act of sorting, routing, opening, removing contents, attaching envelope, dating, registering, screening, and annotating incoming mail

   b. Preparing outgoing mail--The act of preparing envelopes, folding, and inserting letters, affixing required stamps or using postage meter, sealing envelopes, checking, and presorting for mailing

   c. Postal Services--Includes classification of mail, special mailing services, official mail, and postal information

2.
   8 a.
   6 b.
   7 c.
   10 d.
   9 e.
   2 f.
   5 g.
   1 h.
   3 i.
   4 j.

3. In a small office one individual may sort and deliver mail to various individuals and departments. In a large company, the mail is sorted by departments by means of sorting bins or trays. After it has been sorted, it is delivered by the mail clerk or messenger.

   Telegrams, mailgrams, special delivery, registered, insured, and certified mail are handled promptly upon receipt, while the remainder of the mail should be sorted as follows: (a) first-class mail; (b) interoffice mail; (c) bulk mail such as newspapers, periodicals, books, catalogs, circulars, and merchandise.

Mail marked "Personal" should be separated and delivered to specific addressed individuals.

4. a. Open telegrams, registered mail, and special delivery first. If there are only a few, they may be opened with a hand letter opener. If there are many, they may be opened by machine, as described below.

   b. Sort other envelopes according to size, keeping the same size envelopes together.

   c. Take a handful of envelopes of approximately the same size and tap them on a desk or table so the contents will drop to the bottom of the envelopes.

   d. Turn the envelopes upside down lightly to get the top edges even so that they may be run through the letter-opening machine.

   e. Open the letters by running them through the letter-opening machine which takes off a narrow slice at the top of the envelope. If a machine is not used to open the envelopes, the top of each envelope should be slit with a hand letter opener.

5. _____ a.

   _____ b.

   __X__ c.

   __X__ d.

   __X__ e.

   __X__ f.

   _____ g.

   _____ h.

6. a. An envelope is incorrectly addressed. It may be necessary to mention the correct address in future correspondence or as an explanation of why the letter was not answered more promptly.

   b. A letter was missent by the post office and had to be forwarded. This information is needed to explain the reason for a delayed answer.

   c. A letter does not contain a return address.

d. The return address in the letter differs from that on the envelope.

e. The date of the letter differs too much from that on the envelope.

f. Neither a handwritten nor a typewritten signature appears in the letter. The name of the sender may appear as part of the return address on the envelope.

g. A letter specified an enclosure that was not attached to the letter nor found in the envelope.

h. A letter contains a bid, or an offer or acceptance of a contract. The postmark date may be needed as legal evidence.

7. Incoming mail should be marked with the date and time received by using a pen, pencil, rubber stamp, or a time stamp machine.

8. a. (1) Incoming mail such as registered, certified, special delivery, or insured

    (2) Expected (separate-cover) mail

    (3) Mail that is circulated to the executive's associates

    (4) Telegrams and cables

    (5) Mail which contained cash or checks

  b. (1) It furnishes a record of the date of receipt.

    (2) It furnishes a stimulus to answer the mail promptly.

    (3) A letter may have arrived too late for anyone to take care of the matter to which it refers.

    (4) The letter may be undated. The only clue to its date is the date of receipt.

9. Some executives want to see all the incoming mail and should do so if they desire.

Some executives want their secretaries to screen the mail so that all items that should be handled by subordinates or by personnel in other departments is separated from their mail.

10. The mail should be read to identify important facts. Those words and phrases which call attention to the subject of the letter should be underlined. Writing notes in the

margin assists in the disposition of routed letters and also serves as a referral.

11. 5

1

3

4

2

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

ANSWERS TO UNIT TEST - SECTION II

12. _____ a.
_____ b.
X c.
_____ d.
X e.
_____ f.
_____ g.
_____ h.

13. Folding letters to fit small envelopes requires three folds: (1) fold bottom up to 1/2" from the top, (2) fold right third to left, and (3) fold left third to 1/2" from last crease.

Folding letters to fit large envelopes requires two folds: (1) fold slightly less than one third of the letter up toward the top, and (2) fold down the top of the letter to within 1/2" of the bottom fold.

14. A hand-stamp machine which moistens and affixes a stamp every time the plunger is depressed is one method used to stamp mail; another method requires using a strip of stamps passed over a stamp moistener and affixing stamp to the envelope.

15. a. A company obtains a postage meter by first getting a license and paying for a certain amount of postage in advance. This is done at the post office, where the meter is set so that it will lock after the fixed amount of postage is used. The postage meter is periodically taken to the post office, where additional postage is purchased and the meter dials are reset.

b. Postage meters print postage, add a postmark, and seal an envelope in one operation. The postage machine prints postage on a gummed tape for use in mailing packages.

c. Advantages of using a postage meter are as follows:

(1) Time saving when there is a bulk of mail.

(2) Eliminates the possibility of stamps becoming detached in transit.

(3) Speeds the dispatch of letters, since metered mail does not have to be canceled at the post office.

(4) Company has control of its stamp supply so that company stamps are seldom used for the employee's personal mail.

16. If several envelopes are to be sealed manually, five or six should be overlapped at a time on the mailing table so that only the gummed flaps are exposed. A moistener is then run over the flaps and the envelopes are then closed and sealed.

17. __X__ a.

__X__ b.

_____ c.

__X__ d.

__X__ e.

__X__ f.

__X__ g.

_____ h.

_____ i.

18. a. Local

b. Out-of-town

c. Precanceled

d. Metered

19. a. Maintain up-to-date address lists, continually correcting all lists that may involve changes in addresses.

b. When unsure of the correct amount of postage, weigh the mail to avoid wasted postage or mail delayed by insufficient postage.

c. Obtain up-to-date rate charts from postal authorities.

d. Use special delivery service to small towns judiciously, as small post offices do not always provide such service or may give it only during post office hours.

e. Except for urgent items, combine in one mailing at the end of the day all mail addressed to the same person or the same branch office.

f. When sending reply-requested mail, use business reply envelopes rather than stamped envelopes, thus paying postage only on the envelopes actually returned.

g. Use Special Handling rather than Special Delivery for packages except in case of emergency.

20. a. All mail have ZIP Code.

b. Mail be deposited as early as possible, preferably during the morning hours and frequently throughout the day.

c. Letters should be arranged so that all addresses face the same way.

d. Long envelopes and short envelopes should be bundled in separate packages.

e. Special delivery letters should be separated from bundles of ordinary mail.

f. First-class and third-class mail should not be mixed.

g. Metered mail does not require cancellation, so it should be separated from stamped mail.

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UNIT XVII

HANDLING INCOMING AND OUTGOING MAIL

ANSWERS TO UNIT TEST - SECTION III

21. a. Mailing list--Many firms keep lists of their customers, prospective customers, subscribers, clients, or others to whom they address mail repeatedly. A firm may use a number of mailing lists for different purposes (i.e. to advertise a new product, to announce a new service, or to institute a new policy). Special mailing lists of all kinds of prospective buyers, both nationwide and regional, can be purchased.

b. Mailing lists on file cards--The names and addresses of a mailing list are frequently kept on 5" x 3" cards that are filed in alphabetic order. These cards may be grouped under various classifications. The cards may also be filed by subject (the subject that the prospective customer has been interested in or may be interested in later).

c. Up-to-date mailing lists--The names on all mailing lists are constantly changing as newcomers move into the sales area and others move out. Additions, deletions, and corrections of names and addresses should be made whenever the information is received. The post office will assist in maintaining an up-to-date mailing list. For a small fee it will also supply the ZIP Codes for an entire mailing list.

d. Metal plates or stencil plates--When a list consists of more than a thousand names, addressing of sales and other promotional literature is facilitated by the use of embossed or stencil plates. High-speed machines like the Elliott Addressing Machine and the Addressograph are among the numerous business machines available today for processing large volumes of mail.

22. __X__ a.

__X__ b.

__X__ c.

_____ d.

__X__ e.

______ f.

__X__ g.

23. __3__ a.

__1__ b.

__5__ c.

__2__ d.

__4__ e.

__6__ f.

24. __5__ a.

__1__ b.

__5__ c.

__2__ d.

__3__ e.

25. The mailgram combines telegraph and postal services. Western Union installs its telegram receiving equipment in the local post office. A postal employee receives the up-to-100 word message from late afternoon through the night and mails it in a window envelope for guaranteed delivery in the first delivery in the morning.

26. a. Certificate of mailing--A certificate of mailing may be obtained if only proof of mailing is needed. It does not provide insurance coverage for loss or damage. The cost is nominal. No record is maintained at the post office.

b. Certified mail--Certified mail provides a mailing receipt and record of delivery at the addressee's post office. Certified mail does not travel faster than first-class. It does not offer extra security or payment for loss. A return receipt to provide the sender proof of delivery may be obtained for an additional fee. For security, you should use registered mail.

c. Return receipts--The return receipt is proof of delivery. It is available on insured mail of more than $15 value, and on certified and registered mail. The return receipt identifies the article by number, who signed for it and the date it was delivered. For reasonable additional fees a receipt may be obtained showing the exact address of delivery, or delivery of the mail may be restricted to the addressee only (state or federal officials excluded).

27. If mail does not reach its destination at the expected time, the post office may be asked to trace it. The post office will supply a form on which to record the detailed information needed for tracing.

28. When there is a change of address, within the same city or a different city, change of address cards should be obtained from the post office and all correspondents and publishers should be notified of the new address. The effective date of the change should be on the form. First-class mail is forwarded for one year. The post office should be contacted about forwarding other classes of mail, temporary changes of address, and holding mail.

29. A franked piece of mail must have a real or facsimile signature of the sender in place of the stamp and the words Public Document--Free on the address side. Only a few persons are authorized to use the frank, such as the Vice-President of the United States, members and members-elect of Congress, Resident Commissioners, the Secretary of the Senate, and the Sergeant of Arms of the Senate.

    Penalty mail is used for official government correspondence. It travels in penalty envelopes or under penalty labels.

30. Evaluated to the satisfaction of the instructor.

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UNIT XVIII

SELECTING AND PURCHASING SUPPLIES

TERMINAL OBJECTIVE

After completion of this unit, the student should be able to match terms with their definitions; list the features of bond paper, select appropriate second sheets, cite carbon paper features, explain typewriter ribbon features, discuss correction supplies; list miscellaneous supplies; and select and purchase supplies for an office situation. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student will be able to:

1. Match terms with their definitions.
2. List the features of bond paper.
3. Select appropriate second sheets.
4. Cite carbon paper features.
5. Describe envelope characteristics.
6. Explain typewriter ribbon features.
7. Discuss correction supplies.
8. List miscellaneous supplies.
9. Demonstrate the ability to:
    a. List supplies which might need to be ordered biannually, annually, biennially, or more.
    b. Select supplies for an office situation.

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UNIT XVIII

SELECTING AND PURCHASING SUPPLIES

SUGGESTED ACTIVITIES

I. Instructor:

   A. Provide students with objective sheet.

   B. Discuss objective sheet.

   C. Provide students with information sheet.

   D. Discuss information sheet.

   E. Invite a guest from an office supply company to display and speak on paper (different weights, colors, and sizes), carbon, correcting methods, etc.

   F. Provide students with assignment sheets.

   G. Discuss assignment sheets.

   H. Provide students with job sheet.

   I. Discuss job sheet.

   J. Invite a secretary to speak on supplies in relation to the job.

   K. Give test and evaluate results.

II. Student:

   A. Read objective sheet.

   B. Participate in the discussion of the objective sheet.

   C. Read information sheet.

   D. Participate in the discussion of the information sheet.

   E. Observe and participate in discussion of the guest speaker from the office supply company.

   F. Read assignment sheets.

G. Complete assignment sheets.

H. Read job sheet.

I. Complete job sheet.

J. Observe and participate in the discussion of the secretary.

K. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:
   A. Objectives
   B. Information sheet
   C. Assignment sheets
      1. Assignment Sheet #1--Observing Office Supplies
      2. Assignment Sheet #2--Listing Supplies
   D. Answers to assignment sheets
   E. Job sheet
      1. Job Sheet #1--Selecting Supplies
   F. Answers to job sheet
   G. Test
   H. Answers to test

II. References:
   A. Books:
      1. Archer, Fred C. and others. General Office Practice. 4th ed. New York, New York: McGraw-Hill Book Company, 1975.
      2. Gregg, John Robert and others. Applied Secretarial Procedures. 7th ed. Cincinnati, Ohio: South-Western Publishing Co., 1974.
      3. Meehan, James R. and others. Clerical Office Procedures. 5th ed. Cincinnati, Ohio: South-Western Publishing Co., 1973.

4. Meehan, James R. and others. Secretarial Office Procedures. 8th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

5. Wood, Merle W. and Margaret A. McKenna. The Receptionist. New York, New York: McGraw-Hill Book Company, 1966.

B. Catalogs:

1. Clampitt, Max and others. Clampitt Paper Company Catalog.

2. Graham Paper Company Catalog.

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UNIT XVIII

SELECTING AND PURCHASING SUPPLIES

INFORMATION SHEET

I. Definition of terms

  A. Watermark--design located in the weave of the paper which identifies the front of the paper. It is a trademark of quality.

  B. Second sheet--the paper on which carbon copies are made. This sheet, sometimes called onion skin or manifold, is a very thin paper used to facilitate filing.

  C. Copy sheet--a second sheet with the word "copy" printed on it

  D. Carbon set--a preassembled set of carbon paper and copy paper attached together at the top

  E. Carbonless paper--ink impregnated paper, sometimes called NCR (no carbon required). The force of the typewriter keys releases the ink and reproduces the letter or character.

  F. Bond paper--paper that has met specific requirements for higher grade and quality for use as letterheads

  G. Grain--direction that the fibers run in the paper which determine the strength of the paper

  H. Manifolding ability--ability of carbon paper to hold the strength of sharpness of writing and color throughout the number of copies being made

II. Bond paper features

  A. Fiber content

    1. Rag

      a. Best, most durable paper

      b. 100 percent cotton fiber

      c. Yields better erasing and typewriting results

        2. Wood pulp - cheaper, good quality

    B. Weight of bond paper

        1. Letterhead, 24, 20, 16 pound

        2. Interoffice, 20, 16, 12 pound

        3. Duplicating paper, 28, 24, 20, 16 pound

    C. Finish of bond paper

        1. Smooth

        2. Cockle

    D. Size of bond paper

        1. Standard - 8 1/2 by 11

        2. Monarch - 7 1/4 by 10 1/2

        3. Half-sheet - 8 1/2 by 5 1/2

III. Second sheet features

    A. Weight of second sheet

        1. 12 - 14 copies--7 pounds

        2. 9 - 12 copies--9 pounds

        3. 1 - 8 copies--13-20 pounds

    B. Finish of second sheet

        1. Smooth

            a. Uniform

            b. Easy to handle

            c. Likely to show "feed roll" marking

        2. Glazed

            a. More legible carbon copies

            b. Minimum "feed roll" markings

            c. Hard to handle when assembling carbon copies

            d. Produces minimum uniformity of color impression

3. Cockle
    a. Easiest to handle
    b. Resists carbon smearing
    c. Fewer carbons are possible due to cockle finish cushioning the typing.

C. Colors
  1. Many colors
  2. Clearest - white, yellow, pink

IV. Carbon paper features

A. Initial factors to consider in selection of carbon paper
  1. Wearing ability
  2. Cleanliness
  3. Tendency to curl
  4. Color and sharpness of copy
  5. Manifolding ability
  6. Ease of handling

B. Basic styles of carbon paper
  1. Pen or pencil carbon paper - uses pencil carbon
  2. Machine carbon paper

C. Weight of carbon paper
  1. Light - (featherweight) 4 pound carbon
  2. Medium - (intermediate) 5 pound carbon
  3. Heavy
    a. Standard - 7-8 pound carbon
    b. Correspondence - 9 pound carbon

D. Finishes of carbon paper
  1. Hard

a. Sharp gray-colored copies

(Recommended for: material with figures; material handled a great deal; and material on extra-heavy, high gloss paper)

2. Medium

a. Reasonably sharp, black copies

(Recommended for: general correspondence and office work; typists with average touch using pica type; and typists with medium light touch using elite)

3. Intensive

a. Very soft, black finish

b. Smears easily

(Recommended for: typists with a light touch; light-stroking machines, machines with soft platens; and soft-surface manifold papers)

E. Care of carbon paper

1. Store in a box away from extreme temperatures.

2. Store carbon side down.

V. Envelope features

A. Fiber content

1. Rag

2. Wood pulp

B. Weight

1. Regular - 20-24 pounds

2. Windows - 20-24 pounds

3. Booklet - 24-35 pounds

C. Finish

1. Smooth

2. Cockle

D. Sizes

1. Large - 9 1/2 by 4 1/8

2. Small - 6 1/2 by 3 5/8

VI. Typewriter ribbon features

A. Initial factors to consider in the selection of typewriter ribbons

1. Inking

a. Free-flowing - for general use

b. Medium-flowing - for two color ribbons

c. Special-purpose - for offset, spirit duplicating, and photographic purposes.

2. Length

a. Standard (cotton) - 12 yards

b. Top-quality (cotton) - 16 yards

c. Standard (silk) - 18 yards

3. Thickness

a. Thin - clearest for top carbons only

b. Thick - best to produce the desired number of copies

4. Edge

a. Manual - cutting or processed edges

b. Electric - woven edges

5. Fiber content

a. Carbon film - highest quality ribbon available; produces sharp print-like image; used for prestige correspondence; excellent for offset master; use limited to once

b. Carbon paper - produces good image; used extensively for correspondence and thermography; breaks easily; use limited to once

c. Silk and nylon fabrics - clean, sharp image;

lowest wear of fabric ribbons; long life; available in light, medium, and heavy inkings

d. Cotton fabric - many grades; inexpensive; short life; used for routine correspondence, production, and forms; deposits lint on keys; light, medium or heavy inking

VII. Correction supplies

A. Erasers

1. Hard - to remove imbedded ink

2. Soft - to remove surface ink

B. Correction paper - chalk-coated strip of paper that is placed over the error, coated side down, and is typed on to transfer the chalk to the paper thereby eliminating the error

C. Correction fluids - liquids that are painted neatly over the error to eliminate it

D. Self-correcting ribbons - an adhesive ribbon which is prefaced by use of the special backspace key and pulls the ink of the error off by the typing of the keys of the error over the error

VIII. Miscellaneous supplies

A. Desk and machine cleaners

B. Copy holder

C. Pens and pencils

D. Appointment calendar

E. Paper clips

F. Ruler

G. Stapler and staples

H. Scissors

I. Cellophane tape

J. Rubber bands

K. Rubber cement

L. Time data

M. Letter opener

N. Stapler remover

O. Dictionary

P. Reference books

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UNIT XVIII

SELECTING AND PURCHASING SUPPLIES

ASSIGNMENT SHEET #1--OBSERVING OFFICE SUPPLIES

Observe the office supplies which have been displayed on the table. Identify each one and describe the characteristics you smell, see, and feel. Write a brief paragraph on your reactions to each piece of equipment.

(NOTE: Choice of supplies displayed is left up to the discretion of the teacher.)

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UNIT XVIII

SELECTING AND PURCHASING SUPPLIES

ASSIGNMENT SHEET #2--LISTING SUPPLIES

Assume you are a secretary for a department in a large university. Periodically you must order supplies from the bookstore. Which would you order biannually, annually, biennially, or more? Make a list under each division: biannually; annually; biennially or more.

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UNIT XVIII

SELECTING AND PURCHASING SUPPLIES

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

Left up to the discretion of the teacher.

Assignment Sheet #2

Biannually

a. Typewriter ribbon - top quality; carbon film
b. Correcting ribbon
c. Correcting fluid
d. Pencils and pens
e. Onion skin - second sheets
f. Machine carbon paper - medium weight and finish
g. Bond paper - plain and letterhead
h. Time data
i. Large envelopes

Annually

a. Desk calendars
b. Carbonless paper
c. Carbon sets
d. Correction paper
e. Erasers
f. Staples
g. Cellophane tape
h. Rubber bands

Biennially or more

a. Paper clips

b. Dictionaries

c. Reference books

d. Desk and machine cleaners

e. Copy holders

f. Rulers

g. Stapler

h. Scissors

i. Rubber cement

j. Letter openers

k. Staple removers

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UNIT XVIII

SELECTING AND PURCHASING SUPPLIES

JOB SHEET #1--SELECTING SUPPLIES

I. Tools and equipment needed:

A. Supply catalog

B. List of supplies needed

II. Job procedures:

Assume you are an executive secretary to Head of the Personnel Office, Mrs. Rita Adams. Mrs. Adams is planning a panel discussion on motivation for a seminar being held in two months. She needs to invite guest speakers, inform the employees of the seminar, and to collate 200 copies of the research on motivation. Discuss in a paragraph what special supplies might be needed to complete this project. Estimate the cost of this project.

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UNIT XVIII

SELECTING AND PURCHASING SUPPLIES

ANSWERS TO JOB SHEET

Job Sheet #1

For the letters to the guest speakers, use rag quality bond letterhead paper of 16-24 pound weight with a cockle finish in the monarch or standard size. The second sheet is for filing and only one copy is to be made of each, therefore use white paper of 13-20 pound weight with a cockle finish. The carbon paper should be machine carbon paper of medium weight and finish. The typewriter ribbon should be free-flowing, top quality, thin carbon film ribbon with woven edges. If corrections are necessary, a machine with a self-correcting ribbon should be used.

To inform the employees, an interoffice memo should be sent to each one on interoffice (12-20 pounds) bond paper. A half-sheet or standard smooth finish sheet may be used. The body may be carbon copied if heavy weight and hard finish is used. The second sheet should also be interoffice (12-20 pounds) bond paper. The ribbon for the task should be of silk or nylon, free-flowing, top quality, and thick with woven edges. If corrections are necessary, use an eraser on the carbons and any preferred correcting devices on the first page.

In order to collate copies of the research on motivation, a stapler, staples, and staple remover might be needed.

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UNIT XVIII

SELECTING AND PURCHASING SUPPLIES

UNIT TEST

1. Match the following terms and definitions correctly by placing the appropriate number in the blank by the appropriate letter.

_____ a. Ink impregnated paper

_____ b. Ability of carbon paper to hold the strength of sharpness of writing and color

_____ c. Direction fibers run in paper

_____ d. Preassembled set of carbon and copy paper

_____ e. Design in weave of paper

_____ f. Paper on which carbon copies are made

_____ g. High grade and quality paper

_____ h. Second sheet with "copy" printed on it

1. Carbon set
2. Second sheet
3. Grain
4. Copy sheet
5. Manifolding ability
6. Bond paper
7. Watermark
8. Carbonless paper

2. List the features of bond paper.

3. List the characteristics of the appropriate second sheets under these conditions:

   a. 14 copies needed, legibility important

   b. 5 copies needed, neatness important

   c. 10 copies needed, rough draft, uniform

4. Cite five carbon paper features.

5. Describe envelope characteristics.

6. Explain typewriter ribbon features.

7. Discuss correction supplies.

8. List miscellaneous supplies.

9. Demonstrate the ability to:

   a. List supplies which might need to be ordered biannually, annually, biennially, or more.

   b. Select supplies for an office situation.

   (NOTE: If the skills have not been accomplished prior to the test, ask the instructor when they should be completed.)

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UNIT XVIII

SELECTING AND PURCHASING SUPPLIES

ANSWERS TO UNIT TEST

1. 8 a.
   5 b.
   3 c.
   1 d.
   7 e.
   2 f.
   6 g.
   4 h.
2. a. Fiber content - rag and wood pulp
   b. Weight - letterhead, interoffice, duplicating paper
   c. Finish - smooth and cockle
   d. Size - standard, monarch, and half-sheet
3. a. Weight - 7 pound
   Finish - glazed
   Color - white is standard
   b. Weight - 13-20 pound
   Finish - cockle
   Color - white
   c. Weight - 9 pound
   Finish - smooth or glazed
   Color - any color

4. a. Factors to consider in selection:
    1) Wearing ability
    2) Cleanliness
    3) Tendency to curl
    4) Color and sharpness of copy
    5) Manifolding ability
    6) Ease of handling
  b. Basic styles - pen or pencil carbon paper and machine carbon paper
  c. Weight - light, medium, heavy
  d. Finishes - hard, medium, intensive
  e. Care
    1) Store in a box away from extreme temperatures.
    2) Store carbon side down.

5. a. Fiber content - rag and wood pulp
  b. Weight - regular, windows, and booklet
  c. Finish - smooth and cockle
  d. Sizes - large and small

6. Factors to consider in selection:
  a. Inking
  b. Length
  c. Thickness
  d. Edge
  e. Fiber content

7. a. Erasers
  b. Correction paper
  c. Correction fluids
  d. Self-correcting ribbons

8. a. Desk and machine cleaners
   b. Copy holder
   c. Pens and pencils
   d. Appointment calendar
   e. Paper clips
   f. Ruler
   g. Stapler and staples
   h. Scissors
   i. Cellophane tape
   j. Rubber bands
   k. Rubber cement
   l. Time date
   m. Letter opener
   n. Stapler remover
   o. Dictionary
   p. Reference books

9. Evaluated to the satisfaction of the instructor.

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UNIT XIX

HANDLING THE PETTY CASH FUND

TERMINAL OBJECTIVE

After completing this unit, the student will be able to state the purpose for establishing and the procedure used in handling a petty cash fund. This knowledge will be evidenced through demonstration and by successfully completing a unit test.

SPECIFIC OBJECTIVES

After completing this unit of instruction, the student will be able to:

1. State the purpose of a petty cash fund.
2. Cite the three steps involved in establishing a petty cash fund.
3. Select the statement which best describes the procedure used in handling a petty cash fund.
4. Demonstrate the ability to:
    a. Organize a record of transactions in a petty cash book.
    b. Close a petty cash book.

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UNIT XIX

HANDLING THE PETTY CASH FUND

SUGGESTED ACTIVITIES

I. Instructor:

  A. Provide objective sheet.
  B. Discuss objective sheet.
  C. Provide information sheet.
  D. Discuss information sheet.
  E. Show and discuss transparencies.
  F. Provide job sheets.
  G. Discuss job sheets.
  H. Give test and evaluate results.

II. Student:

  A. Read objective sheet.
  B. Study information sheet.
  C. Participate in discussion and view transparencies.
  D. Complete job sheets.
  E. Take test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objectives
  B. Information sheet
  C. Transparency masters
    1. XIX-TM-1--Voucher

2. XIX-TM-2--Petty Cash Fund
3. XIX-TM-3--Petty Cash Summary
4. XIX-TM-4--Petty Cash Book

D. Job sheets

1. Job Sheet #1--Voucher
2. Job Sheet #2--Petty Cash Summary
3. Job Sheet #3--Petty Cash Book

E. Answers to job sheets

F. Test

G. Answers to test

II. References:

A. Freeman, M. Herbert and others. Accounting 10/12. 2nd ed. New York, New York: Gregg Division, McGraw-Hill Book Company, 1973.

B. Carson, A. B. and others. Secretarial Accounting. 9th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

C. Huffman, Harry and Jeffrey R. Stewart, Jr. General Recordkeeping. 7th ed. New York, New York: Gregg Division, McGraw-Hill Book Company, 1976.

D. Brock, Horace R. and others. Accounting: Basic Principles. 3rd ed. New York, New York: McGraw-Hill Book Company, 1974.

E. Anderson, Ruth I. and others. The Administrative Secretary. San Francisco, California: Gregg Division, McGraw-Hill Book Company, 1970.

F. Meehan, James R. and others. Secretarial Office Procedures. 8th ed. Cincinnati, Ohio: South-Western Publishing Co., 1972.

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UNIT XIX

HANDLING THE PETTY CASH FUND

INFORMATION SHEET

I. Purpose of petty cash fund

   A. To pay for small expenses involved in operating office (stamps, delivery, advertising, bus fare for errands, taxi, dinner for employees who work late, office supplies, etc.)

   B. To furnish refreshments such as coffee, etc.

   C. To pay C. O. D. charges

II. Establishing the fund

   A. Write check to the person in charge of the fund.

   B. Check signed and cashed by authorized person.

   C. Money placed in petty cash box.

III. Procedure for handling fund

   A. Make a voucher for each withdrawal.

      1. Date

      2. Paid to whom

      3. For what purpose

      4. Amount

      5. Approval signature

   B. Post vouchers to petty cash fund.

   C. Replenish the fund.

      1. When the amount of money on hand reaches a designated low level

      2. When certain dates are specified for replenishing

      3. By following procedure:

  - a. Proving petty cash fund by taking a total of cash on hand and total of cash receipts
  - b. Preparing a summary report listing cash expenditures, showing balance on hand, and attaching the vouchers
  - c. Writing a check for the total amount of cash receipts
  - d. Submitting summary report and check to person authorized
  - e. Cashing check and place money in petty cash box
  - f. Post the amount of the check to petty cash journal

IV. Petty cash book

- A. Proves the petty cash fund by organizing a record of all transactions.
  - 1. First line - totals are entered
  - 2. Second line - record date, explanation of expenditure, voucher number, delivery expense, and amount paid out
- B. Close the petty cash book
  - 1. Pencil foot all money columns.
  - 2. Check total of all the Distribution of Payments columns to be sure the amount equals the Paid Out column.
  - 3. When columns balance, the final totals are entered.
  - 4. Find difference between Received column and Paid Out column which represents cash on hand.
  - 5. Total Received and Paid Out columns.
  - 6. Draw double rules beneath columns and the Date column.
  - 7. Transfer the current cash on hand to the Received column (amount remaining in Petty Cash Fund).
  - 8. Record date, the explanation, and the number of the check used to replenish the fund.
  - 9. Enter the amount put into the petty cash fund in the Received column.

VOUCHER

NO. ____________________ AMOUNT $ ______________

PETTY CASH VOUCHER

DATE ______________

PAID TO ____

FOR ____

CHARGE TO ______________________________________

APPROVED BY ____________ RECEIVED BY ____________

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XIX-817

PETTY CASH FUND

PAY FOR SMALL EXPENSES INVOLVED IN OPERATING OFFICE

- STAMPS
- DELIVERY
- ADVERTISING
- BUS FARE FOR ERRANDS
- TAXI FARE
- DINNER FOR EMPLOYEES WHO WORK LATE
- OFFICE SUPPLIES

PETTY CASH SUMMARY

ENDON CORPORATION
PETTY CASH SUMMARY
July 30, 1977

Advertising Expense	$ 73.42
Delivery expense	26.32
Miscellaneous expense	14.13
Office expense	81.81
Total petty cash vouchers	$195.68
Plus cash in box	34.32
	$230.00

PETTY CASH BOOK

PETTY CASH FUND		DATE	EXPLANATION	VOUCHER NO.	DISTRIBUTION OF PAYMENTS			
RECEIVED	PAID OUT				ADVERTISING EXPENSE	DELIVERY EXPENSE	MISC. EXPENSES	OFFICE EXPENSE

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UNIT XIX

HANDLING THE PETTY CASH FUND

JOB SHEET #1--VOUCHER

I. Tools and equipment needed:

  A. Voucher forms

  B. Pen or pencil

II. Procedure:

From the following information, select and record those facts which are needed for future reference. Complete a voucher for each transaction. Use your name on the Approved by line.

Assume you are cashier for Kendon Corporation. You are the person responsible for preparing vouchers for all petty cash disbursements and for depositing $100.00 into the fund each month for replenishing. During the month of July, the following transactions occurred.

July 6	Gave $2.50 to Joyce Wilson for taxi fare (delivery service)
July 7	Gave Henry Lockmore $13.60 for postage stamps (office expense)
July 8	Gave Henry Lockmore $4.60 to buy coffee and coffeemate for refreshment bar (miscellaneous)
July 12	Gave $16.50 to Albert Jackson for repairing locks on door (miscellaneous)
July 13	Gave Joyce Wilson $6.40 to purchase emergency first-aid kit (miscellaneous)
July 16	Gave Gail Freeman $2.70 for carbon paper (office supplies)
July 20	Gave $10.00 to local high school paper for advertisement (advertising)
July 23	Paid $1.50 for parking fee (miscellaneous)
July 25	Gave Henry Lockmore $3.12 for extension cord (office)
July 29	Made $15.00 donation to Red Cross (miscellaneous)

No.______ Amount $________

PETTY CASH VOUCHER

Date__________

Paid to________________

For____________________

Charge to______________

Approved by____________

Received by____________

No.______ Amount $________

PETTY CASH VOUCHER

Date__________

Paid to________________

For____________________

Charge to______________

Approved by____________

Received by____________

No.______ Amount $________

PETTY CASH VOUCHER

Date__________

Paid to________________

For____________________

Charge to______________

Approved by____________

Received by____________

No.______ Amount $________

PETTY CASH VOUCHER

Date__________

Paid to________________

For____________________

Charge to______________

Approved by____________

Received by____________

No.______ Amount $________

PETTY CASH VOUCHER

Date__________

Paid to________________

For____________________

Charge to______________

Approved by____________

Received by____________

No.______ Amount $________

PETTY CASH VOUCHER

Date__________

Paid to________________

For____________________

Charge to______________

Approved by____________

Received by____________

XIX-828

No.______ Amount $________

PETTY CASH VOUCHER

Date__________

Paid to__________________

For__________________

Charge to__________________

Approved by__________________

Received by__________________

No.______ Amount $________

PETTY CASH VOUCHER

Date__________

Paid to__________________

For__________________

Charge to__________________

Approved by__________________

Received by__________________

No.______ Amount $________

PETTY CASH VOUCHER

Date__________

Paid to__________________

For__________________

Charge to__________________

Approved by__________________

Received by__________________

No.______ Amount $________

PETTY CASH VOUCHER

Date__________

Paid to__________________

For__________________

Charge to__________________

Approved by__________________

Received by__________________

No.______ Amount $________

PETTY CASH VOUCHER

Date__________

Paid to__________________

For__________________

Charge to__________________

Approved by__________________

Received by__________________

No.______ Amount $________

PETTY CASH VOUCHER

Date__________

Paid to__________________

For__________________

Charge to__________________

Approved by__________________

Received by__________________

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UNIT XIX

HANDLING THE PETTY CASH FUND

JOB SHEET #2--PETTY CASH SUMMARY

I. Tools and equipment needed:

A. Typewriter

B. Information and vouchers from Job Sheet #1

II. Procedure:

On one-half sheet of letter size paper prepare a Petty Cash Summary listing the total cash payments for each classification and the amount of cash on hand.

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UNIT XIX

HANDLING THE PETTY CASH FUND

JOB SHEET #3--PETTY CASH BOOK

I. Tools and equipment needed:

   A. Vouchers from Job Sheet #1

   B. Pencil

   C. Ruler

II. Procedure:

   A. Using vouchers from Job Sheet #1, record each transaction which occurred during the month of July.

   B. Record total cash on hand.

   C. Take pencil footing totals.

   D. When balanced, double rule.

PETTY CASH BOOK

PETTY CASH FUND		DATE	EXPLANATION	VOUCHER NO.	DISTRIBUTION OF PAYMENTS			
RECEIVED	PAID OUT				ADVERTISING EXPENSE	DELIVERY EXPENSE	MISC. EXPENSES	OFFICE EXPENSE

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UNIT XIX

HANDLING THE PETTY CASH FUND

ANSWERS TO JOB SHEETS

Job Sheet #1

No. 1 Amount $ 2.50

PETTY CASH VOUCHER

Date July 6

Paid to Joyce Wilson

For Taxi fare

Charge to Delivery service

Approved by (student's name)

Received by J.W.

No. 2 Amount $ 13.60

PETTY CASH VOUCHER

Date July 7

Paid to Henry Lockmore

For Postage Stamps

Charge to Office expense

Approved by (students name)

Received by H.L.

No. 3 Amount $ 4.60

PETTY CASH VOUCHER

Date July 8

Paid to Henry Lockmore

For Coffeemate & coffee

Charge to Miscellaneous

Approved by (students' name)

Received by H.L.

No. 4 Amount $ 16.50

PETTY CASH VOUCHER

Date July 12

Paid to Albert Jackson

For Lock repairs

Charge to Miscellaneous

Approved by (students' name)

Received by A.J.

No. 5 Amount $ 6.40

PETTY CASH VOUCHER

Date July 13

Paid to Joyce Wilson

For First-aid kit

Charge to Miscellaneous

Approved by (student's names)

Received by J.W.

No. 6 Amount $ 2.70

PETTY CASH VOUCHER

Date July 16

Paid to Gail Freeman

For Carbon paper

Charge to Office Supplies

Approved by (students' name)

Received by G.F.

No. 7 Amount $ 10.00

PETTY CASH VOUCHER

Date July 20

Paid to Local High School

For Paper

Charge to Advertising

Approved by (student's name)

Received by J.H.

No. 8 Amount $ 1.50

PETTY CASH VOUCHER

Date July 23

Paid to J.C.'s Parking

For Parking fee

Charge to Miscellaneous

Approved by (student's name)

Received by ______

No. 9 Amount $ 3.12

PETTY CASH VOUCHER

Date July 25

Paid to Henry Lockmore

For Extension Cord

Charge to Office Expense

Approved by (student's name)

Received by H.L.

No. 10 Amount $ 15.00

PETTY CASH VOUCHER

Date July 29

Paid to Red Cross

For Donation

Charge to Miscellaneous

Approved by (student's name)

Received by ______

No. ______ Amount $ ______

PETTY CASH VOUCHER

Date ______

Paid to ______

For ______

Charge to ______

Approved by ______

Received by ______

No. ______ Amount $ ______

PETTY CASH VOUCHER

Date ______

Paid to ______

For ______

Charge to ______

Approved by ______

Received by ______

Job Sheet #2

Kendon Corporation
Petty Cash Summary
August 1, 1977

Advertising Expense.	$ 10.00
Delivery Expense	2.50
Miscellaneous Expense.	44.00
Office Expense	19.42
Total Petty Cash Vouchers.	$ 75.92
Plus Cash in Box	24.08
Total Petty Cash Fund.	$100.00

Job Sheet #3

PETTY CASH BOOK

PETTY CASH FUND		DATE		EXPLANATION	VOUCHER NO.	DISTRIBUTION OF PAYMENTS			
RECEIVED	PAID OUT					ADVERTISING EXPENSE	DELIVERY EXPENSE	MISC. EXPENSES	OFFICE EXPENSE
100 00	2 50	July	6	Taxi fare	1		2 50		
	13 60	July	7	Postage Stamps	2				13 60
	4 60	July	8	Coffee and Coffeemate	3			4 60	
	16 50	July	12	Lock repairs	4			16 50	
	6 40	July	13	First-aid kit	5			6 40	
	2 70	July	16	Carbon paper	6				2 70
	10 00	July	20	School paper ad	7	10 00			
	1 50	July	23	Parking fee	8			1 50	
	3 12	July	25	Extension cord	9				3 12
	15 00	July	29	Donation to Red Cross	10			15 00	
	75 92			Totals		10 00	2 50	44 00	19 42
	24 08		31	Cash on hand					
100 00	100 00								
24 08				Cash on hand					
75 92				Replenish fund Ck no 285					

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UNIT XIX

HANDLING THE PETTY CASH FUND

UNIT TEST

1. State the purpose of a petty cash fund.

2. Cite the three steps involved in establishing a petty cash fund.

   a.

   b.

   c.

3. Select the statement which best describes the procedure used in handling a petty cash fund. Record the number of that statement on the blank line.

   _____ a. The information recorded on a voucher includes:

   (1) Date

   (2) Person to whom money is paid

   (3) Purpose

   (4) Amount

   (5) Approval signature

   (6) All of the above

   (7) None of the above

_____ b. The petty cash fund is replenished:

(1) When all the money is gone.

(2) When the amount of money on hand reaches $50.00.

(3) When certain dates are specified for replenishing.

(4) All of the above

(5) None of the above

_____ c. Petty fund accounts are replenished by:

(1) Preparing petty cash books.

(2) Preparing vouchers.

(3) Writing and cashing a check for the amount of cash spent.

(4) All of the above

(5) None of the above

4. Demonstrate the ability to:

a. Organize a record of transactions in a petty cash book.

b. Close a petty cash book.

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UNIT XIX

HANDLING THE PETTY CASH FUND

ANSWERS TO UNIT TEST

1. The purpose of a petty cash fund is to pay for small expenditures involved in operating an office, such as advertising, delivery, miscellaneous, and office supplies.

2. Establishing a petty cash fund involves:

   a. Writing a check to the person in charge of the fund.

   b. Having the check signed and cashed by authorized person.

   c. Placing money in petty cash box.

3. __6__ a.

   __3__ b.

   __3__ c.

4. Evaluated to the satisfaction of the instructor.